



# A GUIDE TO INCLUSIVE AND REPARATIVE ARCHIVAL DESCRIPTION

at Tulane University Libraries and Newcomb Archives  
and Vorhoff Collection

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# 1 Introduction

## Goals

These guidelines aim to assist archival work for employees at Tulane University Libraries in creating conscious, inclusive description within a framework of cultural humility (Tai, 2020). These guidelines are not meant to be authoritative. We acknowledge the evolving nature of language, identity, and of archival descriptive practices. We commit to staying informed and aware of developments in the field. The guidelines serve as a foundation to:

- Mitigate harm caused by archival description
- Create a positive framework for future finding aid creation and revision
- Enhance the opportunity for community input and feedback

## Contributors

This guide was created by archivists and library staff at Tulane University Special Collections (TUSC) and Newcomb Archives as a part of Inclusive and Reparative (I/R) Description Working Group. The I/R Working Group is a collaborative, cross-library working group dedicated to the implementation of reparative description and inclusive practices in archival work at Tulane University Libraries. The authors do not intend to speak for all audiences, identities, and communities.

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## Tulane University Land Acknowledgment

We acknowledge and pay tribute to the original inhabitants of this land. The city of New Orleans is a continuation of an indigenous trade hub on the Mississippi River, known for thousands of years as *Bulbancha*. Native peoples have lived on this land since time immemorial, and the resilient voices of Native Americans remain an inseparable part of our local culture. With gratitude and honor, we acknowledge the indigenous nations that have lived and continue to thrive here.

For an expanded version of Tulane University's land acknowledgment, please visit:

<https://tulane.edu/racial-equity/land-acknowledgement>.

## Positionality Statement

Tulane University situates itself on the campus of Tulane University in the city of New Orleans, Louisiana within the greater United States of America. Tulane traces its origins to 1834, when it was founded as the Medical College of Louisiana. It was renamed the University of Louisiana by the state legislature in 1847. In 1884, the legislature transferred the school to the Board of Administrators of the Tulane Education Fund, establishing Tulane University as a private, predominantly white, nonsectarian university and it was renamed in honor of benefactor Paul

Tulane. Tulane University has an operating budget of over \$1 billion and an endowment of \$2 billion.

### Collection Development

The archival holdings of Tulane University Special Collections comprise four collecting repositories: the Hogan Archive of New Orleans Music and New Orleans Jazz (HJA), the Louisiana Research Collection (LaRC), the Southeastern Architectural Archive (SEAA), and the Tulane University Archives (UA). The collecting areas of these repositories include Louisiana and New Orleans political and social history from the early colonial period to the present; the American Civil War; local industries and commerce; the natural and built environment; literature; LGBTQ+ organizations and activism; Jewish studies; New Orleans music industry, musicians, music, performing artists; and the institutional records and memory of Tulane University. See the [TUSC Collection Development Policy](#) for more information on collecting focus and practice.

The Newcomb Archives and Nadine Robbert Vorhoff Collection are part of Newcomb Institute of Tulane University. The Archives was founded in 1988 following the receipt of a National Historical Publications and Records Commission grant, in recognition of the need to preserve the records of Newcomb College, the former women's coordinate college of Tulane University. Since that time, the Archives has evolved from a collection of primary source materials focused on the history of Newcomb College to include the personal papers of Newcomb alumnae as well as records broadly documenting feminist movements and gender equity work. The Archives' mission is to collect, preserve, and make available records that document the history of women and gender in the Gulf South. The Vorhoff Collection was founded as the library of Newcomb College Women's Center in 1975 and was originally intended to be a resource for alumnae interested in re-entering/entering the workforce later in life. In present day, the Vorhoff Collection is a non-circulating special collections library devoted to topics such as gender and sexuality, feminist zines, tarot, women in horror, artists' books, prescriptive literature, culinary history, women's education, and children's literature, among others.

### Why Create Guidelines?

These guidelines were conceptualized in 2022 by staff at TUSC and Newcomb Archives to clarify and guide our reparative and inclusive description work with archival collections at Tulane University. As a predominantly white institution in the American South, Tulane University has participated in “privileging, preserving, and reproducing a history that is predominately white” (Sutherland, 2017). It is this working group’s goal to actively participate in undoing white supremacy within our institution and profession by implementing inclusive descriptive practices that highlight a greater range of identities within the collections we care for *and* to correct inaccurate, outdated, and harmful language used in the past to describe them. We acknowledge that our guidelines are inspired and informed by the ongoing work of others in our profession.<sup>1</sup> This work is necessarily collaborative, iterative, and meant to evolve as our learning continues.

Archival records include many gaps. Creators may not have documented all their activities and can only provide limited insight into their creative and business processes. Natural disasters (like

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<sup>1</sup> See Appendix A for a list of resources related to critical archival studies and inclusive and reparative description.

fires, hurricanes, floods, and tornados) can also damage and separate materials before and after they reach an archival repository. But more importantly, we must consider that standard archival practice traditionally focuses on collecting from “significant” creators, and this often means that our historical context is shaped by those in power, rather than the individuals subjugated by oppressive systems. Researchers seeking a counter-narrative to those who have been historically oppressed are often met with incomplete histories.

Inspired by the work of Lae’l Hughes-Watkins, reparative description is retrospective work that seeks to undo the damage and exclusion enforced by traditional academic institutions “that foster an imbalance of power” (Hughes-Watkins, 2018). This work entails reviewing, revising, and/or contextualizing outdated and harmful language used in previously created archival description and to create finding aids that are accurate, inclusive, and community centered. Reparative description does not seek to erase or obscure past harms, but to acknowledge harm and amend it, often using notes, disclaimers, or acknowledgements to be transparent.

The creation of inclusive and reparative description guidelines will aid our present and future work by compiling and explaining existing best practices in the field, promoting language that is preferred by communities themselves, and implementing thoughtful, accurate use of language when creating access points to the collections we steward.

#### Schedule for review

This document will be reviewed on an annual basis.

Last Review: April 2024

## 2 Guiding Principles

We acknowledge that archival work is not neutral and as archivists we adhere to the [Society of American Archivists’ Core Values Statement and Code of Ethics](#). Within Tulane University Special Collections, our values include a commitment to diversity, equity, and inclusion in our leadership and professional practice, which can be found in our [Vision, Mission, and Values Statement](#). Our [Statement on Harmful and Non-Inclusive Language in Archival Description](#) also provides our commitment to reparative description to our users and colleagues.

In addition, the authors of this document include the following principles to guide our work at Tulane University:

**Transparency:** Our work centers on creating accurate description and access tools for all collections at Tulane. We aim to identify changes made in reparative work to inform researchers when a finding aid has been revised to incorporate new information or when formerly accepted terminology is changed to remove harmful language. When doing so, we incorporate contextual notes or other indicators to explain why and where changes have been made within a finding aid. Our goal is also to share documentation created to guide reparative and inclusive description work at Tulane, which includes citations and guidelines.

**Collaboration:** We are committed to working with the individuals and communities represented in our collections to better understand and share their contents. Collaborative activities include

research, conversation, consultation, and incorporation of shared knowledge into our professional practice. We seek to emphasize collaborative work with our colleagues at Tulane, the greater New Orleans community, and colleagues at other institutions. Our work is grounded in professional collaboration and knowledge sharing that promotes continuous learning, reflection, and engagement.

**Accessibility:** Accessibility is essential to fostering inclusivity because it facilitates discovery of our collections and invites users into our digital and physical spaces. We seek to create intellectual access points to our collections that incorporate clear, accurate language and physical research spaces in our buildings that are welcoming and comfortable for all bodies. In doing so, we reduce harm and provide the means with which to engage with the collections in our care.

**Transformative care and empathy:** We commit to an ethics of transformative care. “We strive to elevate the expertise and lived experiences of the creators and communities documented in our collections. We aim to honor the complexities of their stories, and we respect their right to self-identify and self-describe” (Vision, Mission, & Values, Tulane University Special Collections, n.d.). We recognize our own humanity and fallibility and remain open to new information. Our work is informed by research and communication with the communities documented in the collections we steward, and community expertise and preferred terminology are incorporated into collection description.

### 3 Archival Description

Archival description<sup>2</sup> is the language used to describe archival material in a finding aid or bibliographic record. Archival description is stored as metadata that can be shared widely and used by humans and machines to communicate the who, what, where, when, and how of a collection. Our goal is to create description that is grounded in an ethics of care and respect for the people whose lives are documented in the collections we steward.

The way we approach archival description has an impact on how a collection will be accessed and understood by researchers. Compassionate and inclusive description is a necessary aspect of archival processing as it helps present a more accurate representation of collections and the communities that create them by using clear, direct language that addresses power imbalances and helps remove barriers to increase and facilitate access.

When creating description, consider the community and individuals documented in the collection, remembering that no community can speak for all its individual members. In some cases, there will be different preferences within a group and preferred terms can change over time. However, it is still important for archivists to incorporate research of a community’s preferred terminology and self-identification into descriptive practice. Knowledge of a community’s history or an

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<sup>2</sup> We adhere to [DACS](#), the Society of American Archivists’ standard for archival description, and we consult the [Archives for Black Lives in Philadelphia \(A4BLiP\) Anti-Racist Description Resources](#), which has been endorsed by SAA as an external standard.

individual's life facilitates more accurate, respectful description that is grounded in care rather than an artificial sense of neutrality.

Traditionally, archivists have been trained to strive for a "neutral voice" to create objective, unbiased archival description. However, as noted by the Archives for Black Lives in Philadelphia's (A4BLiP) Anti-Racist Description Working Group, the "neutral voice" only serves to underscore and perpetuate power structures and existing social hierarchies (Archives for Black Lives in Philadelphia (A4BLiP) Anti-Racist Description Resources, Society of American Archivists, n.d., p. 3).

### Archival Intervention

When should archivists intervene? How do archivists make the user aware of changes they impose on a collection? What does it mean to contextualize a creator's world or word choice? Borrowing language from our colleagues at Penn State, "archival interventions should be focused on creating context for offensive language and topics, highlighting individuals and communities that were ignored in the collection, and creating a more discoverable collection for researchers" (Mitchell, 2021, p. 7). The following explanations represent common situations for archivists while working with collections.

#### **Examples of when to intervene:**

1. When potentially harmful content exists in collections, which might include offensive language, images, or objects, archivists should address this throughout the finding aid with appropriate notes, such as content warnings, at the appropriate level.
2. If description previously created by an archivist (often called legacy description) ignores creators or subjects of marginalized individuals or groups, revision of this description should be more inclusive and show the context for the creation of the records (and reasons for absences of such individuals or groups).
3. If description previously created by an archivist (often called legacy description) valorizes creators or subjects, uses aggrandizing language to describe them, or ignores a creator's activity that may be harmful to a community or persons, revise it. Include fact-based information inclusive of all activity and associations of the creator that does not add an interpretation of the creator's past.

#### **Examples of how to intervene:**

1. While arranging a collection, archivists will create collection, series, subseries, and folder titles for the finding aid; archivists will also supply titles for some items, such as photographs. During this process, it is important for an archivist to use inclusive language.
2. If outdated or offensive language was used by a previous archivist to describe a collection, a version of the finding aid must be saved before changing to it more inclusive language and/or adding more contextualizing information.
3. In the process of arranging a collection, an archivist may separate a collection into series or subseries to make more apparent previously marginalized creators present in the collection.
4. Archivists can create an aggregation of data for collections to document harmful legacy descriptions and controlled vocabulary that is outdated or offensive. In doing this, archivists can consult with source communities for interpretations of descriptions and encourage information sharing sessions to create less harmful description and access points.



## General Guidance for Voice and Style

Below are some basic guidelines regarding the use of voice and style to keep in mind when drafting inclusive archival description. The following have been adapted from several published guides, the foremost being the A4BLiP's Anti-Racist Description Resources.<sup>3</sup>

- Avoid veneration and aggrandizement. Avoid words such as “prominent,” “prestigious,” “distinguished,” and “significant.” Instead, include titles of publications, awards received, positions held, and dates to show impact of subjects or creators.
- Use people’s names instead of describing them by their relationship to others.
  - For example, Jada Pinkett Smith instead of Mrs. Will Smith
- Be cognizant of secondary or “hidden” creators (such as spouses, secretaries, assistants, students, and others whose labor or influence has played a part in creating the collection).
- Present known, fact-based information about individuals, groups, and organizations. Do not include presumptions or generalizations.
- Do not use euphemistic language when describing acts of violence or oppression. Use direct language to accurately describe violent or oppressive actions documented in a collection.
- Default to person-first language unless you know the individual or community you are describing prefers alternate terminology (i.e., person with a disability vs. disabled person).
- Describe people as they would describe themselves (Korean, not Asian). Consult alternative cataloging schemes created by the subjects of the records being described when and if they are available.
- Avoid using archival or other discipline-specific terminology that is not easily defined by a general audience. Choose language that is accessible to a wide audience.
- Do not change creator-supplied language to “correct” harmful or offensive terms.
- Avoid use of the passive voice so responsibility of actions remains embedded in description rather than shifted away from perpetrator(s).

## Drafting Positionality Statements

Archivists provide information about a creator in a finding aid to inform researchers of the creator’s cultural background, justify their credentials on a subject, and otherwise contextualize how and why materials were made. In an inclusive and reparative context, this means highlighting skewed, biased, or harmful worldviews that have clear impact on the materials and contextualizing relevant power dynamics. As much as possible, given the evidence provided in the collection itself and with background research on the creator, we aim to integrate positionality statements into archival description that help a user contextualize the perspective of the creator.

## Creator-sourced description

If harmful or non-inclusive language is part of archival material in the collection (such as the title of a pamphlet, folder, or the caption of a photograph), we aim to provide information for the user

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<sup>3</sup> See Appendix A for a list of anti-oppressive resources consulted.

in the finding aid at all appropriate levels to acknowledge the existence and reason for maintaining them. For example, the archivist can add a statement such as, “This collection contains creator-supplied titles that include racist and sexist terminology as indicated by quotation marks, which have been inserted by the processing archivist.” See the following section on Content Warnings and Disclaimers for more information.

If a decision is made to revise language in an original or creator-supplied title, provide information for the user in the finding aid to acknowledge the existence and reason for changing them at all appropriate levels that includes the original title and explanation. For example, a statement can be added, such as: This folder was originally titled “XYZ” and was revised in 20XX to remediate [racist/sexist/outdated] language and reflect current preferred terminology.

### **Photograph Titles**

It is common for photographs to be untitled, which requires an archivist to supply titles if they’re being described at the item level.

- When possible, seek guidance from creators, group members or donor about identifiable groups.
- Describe photographs briefly and accurately. Do not impose a “reading” or assumptions about people depicted beyond what is visible in the photo.
- When a photo or image contains an offensive caption, it isn’t necessary to include the offensive language in the title. If the caption is essential to the photograph or image, add a content warning or other note to explain why the title or caption remains as is.

### **Folder Titles**

If a decision is made to revise language in an original or creator-supplied folder title, create a processing information note that includes the original title and explanation for why it was changed<sup>4</sup>.

### **Content Warnings and Disclaimers**

When processing a collection, processing archivists will become very familiar with the collection’s contents and may discover content that is harmful or graphic, e.g., ableist, homophobic, racist, or sexist language and/or imagery. It is our responsibility to not only apply Content Warnings when we spot these aspects in our materials, but also consider how we can contextualize the creation of this content. By engaging in reparative description, we do not erase the impacts or accomplishments of our creators, but give our patrons more nuance regarding creator’s lives, biases, and perspectives.

In archival practice, content warnings are written notices that precede potentially sensitive content and are added to the finding aid to contextualize the collection. These warnings also assist the Research Services and Curatorial staff when providing instruction, building out curriculum with professors, and otherwise engaging our campus community. A content warning

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<sup>4</sup> For more on this, the section Handling Racist Folder Titles and Creator-Sourced Description (pg. 8) in A4BLiP’s Anti-Racist Description Resources.

gives anyone engaging with our materials the opportunity to consider how potentially sensitive content will affect their research, strategize on how they can lessen the impact of harmful materials, or skip/abandon the materials altogether if they so choose.

Consider the emotional labor required of both our staff and patrons who spend time and effort combing through, analyzing, and contextualizing our collections. Beyond the stress of the actual work in archives, negative experiences with systematic oppression and/or the mental health situation of staff and other users mean that some may be triggered during collections work or research process. While content warnings cannot fully alleviate these stressors, they can help us prepare to meet challenging materials.

### What Gets a Content Warning?

Content warnings are not meant to restrict researchers but to inform. As noted, archival processing and research can demand significant emotional labor. General themes to consider that will likely require a content warning:

- Depictions of war and violence, particularly visual
- Sexually explicit content and imagery, pornography
- Prolific use of racist, homophobic, xenophobic, antisemitic and other hate language that demean individuals and groups of people
- Accounts of enslavement, abuse, sexual violence
- Health conditions including mental health, ableism
- Animal cruelty

Remember that we all may have different standards concerning what is “offensive” and content warnings should be discussed and agreed to before being applied to the finding aid.

### Applying Content Warnings

TUSC’s standardized content warning, quoted below, should be placed as a blanket statement on all collections with harmful, non-inclusive, and challenging content as a General Note with a “Content Warning” label in ArchivesSpace.<sup>5</sup> It is structured in three parts: identifying that the content exists, linking to our “Statement on Harmful and Non-Inclusive Language in Archival Description” to contextualize how archivists can deal with these matters, and the contact email for our Special Collections to ensure that any information we missed regarding harmful language gets back to us. See [HJA-041, Louis Prima papers](#) for how this note is applied at the collection level.

“This collection contains language and materials that may be offensive, outdated or harmful. See Tulane University Special Collections’ [Statement on Harmful and Non-Inclusive Language in Archival Description](#) for more information about our current practices and commitment to inclusive and reparative action in the archives, which

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<sup>5</sup> The University of Manchester John Rylands Research Institute and Library deploys another type of content warning: “As a historical resource, this collection reflects the racial prejudices of the era in which it was created, and some items include language and imagery which is offensive, oppressive and may cause upset. The use of this language is not condoned by The University of Manchester, but we are committed to providing access to this material as evidence of the inequalities and attitudes of the time period.” See this [blog entry](#) about its creation.

includes ongoing efforts to remediate or contextualize ableist, euphemistic, homophobic, racist, sexist and other forms of oppressive language found within our finding aids and collection materials. If you have concerns about language used in this finding aid, please contact us at [specialcollections@tulane.edu](mailto:specialcollections@tulane.edu).”

The above content warning can be used at any level of a finding aid, including item level. However, more specific content warning can be applied if needed. These content warnings can include the general TUSC statement above or follow the following structure:

“[Type of materials] found in/from/related to [File name] may contain/include [Example of harmful language/content].” See the following examples of subseries content warnings:

- [LaRC-1120, Anne Rice collection, Series 1, Subseries 1: Novels, Adaptations, and Biographies](#)
- [LaRC-1120, Anne Rice Collection, Series 2, Subseries 5: Artwork, 1964-2004](#)
- [LaRC-1120, Anne Rice Collection, Series 2, Subseries 7: Journals, 1962-2002](#)

## 4 Sources, Access Points, and Ethical Use

### 4.1 Authority Sources and Access Points

Authority sources used by TUSC include the Library of Congress Subject Heading database, the Getty Art & Architecture Thesaurus, and the OCLC FAST database. At the moment, TUSC is only able to directly import subject headings from the Library of Congress Subject Heading database into ArchivesSpace via the LCNAF import plug in. Other linked data or authority file sources may be created in ArchivesSpace via rekeying information into the subject heading creation template.

Access points are descriptive information that allows researchers and archives staff to understand topics covered by archival materials as well as who created them. These access points may take the form of agents (persons, families, or corporate bodies), subjects (topical), and place names (geographical).

Authority sources, as mentioned above, are online databases organized by recognized institutions or governing bodies that provide standardized terms and vocabulary to make searching archival and library records possible. Using standardized terms means that both library staff and researchers can more easily determine the contents of an archival collection and its relevance to their research.

Three crucial factors to acknowledge when describing human subjects in special collections are culture, identity, and what names are appropriate to use. Understanding the intersectional nature of these attributes will result in more ethical and inclusive descriptions that help to reduce racist, legacy vocabulary associated with names, especially with people’s names that can be directly linked to how they describe themselves. Cultural competency and compassion are needed to utilize descriptions and names that are respectful to human life, privacy, and consent, weighing it above the need to commodify information and its access.

TUSC has a variety of legacy subject headings, many of which may have been created locally but have existing, corresponding authority files. Some may be outdated, created locally without standardized guidance, or utilize outdated or harmful terms generated either locally or by

authority sources. Updating access points to current or more inclusive terms can be challenging to researchers as formerly used access points are retired and language changes.

Although agents and subject headings derived from authority sources are a powerful tool for archival description, there are a few caveats to consider. Authority sources like the Library of Congress may have outdated or harmful terms still in use. There are occasionally poorly created entries in authority databases, or a lack of linked data subject headings appropriate for local or niche subjects. Harmful language can come from legacy origins or from current authority sources. For example, the Library of Congress uses the contested and harmful term “Dixieland” to describe a genre of jazz music popularized in the early 20th century, while the term “traditional jazz” is currently viewed as being both more accurate and inclusive.

Updated terms may come from subject experts, creators or donors, community stakeholders, or updates to authority files. Western, Anglo-dominant style of record keeping often employs descriptions that dehumanize underrepresented, oppressed, and marginalized groups in American culture.<sup>6</sup> As a consequence, this can obscure historical events and undermine and devalue non-Western traditions and practices.

## 4.2 Subjects

Choosing the correct subject heading for use in ArchivesSpace archival description takes consideration of several factors.

- In general, simple, single-term subject headings are preferred to complex, multi-term string subject headings. Simple subject headings are more accessible for researchers. Complex subject headings can be difficult to understand and difficult to search.
- Limit the number of subject headings attached to each resource record. For TUSC, three to five subjects are sufficient.
- Subject headings should be chosen because at least 20% of the collection addresses that subject, or because the subject has high research value.
- Avoid subject headings that may yield unhelpful results. For example, tagging all University Archives resources with “Tulane University” is not helpful since searching that subject heading will return all resource records.
- Review subject headings in authority sources for outdated or harmful language. You may decide to use locally created subject headings to avoid harmful language.

Community or creator-developed subjects may also conflict with controlled vocabulary coming from an authority database. Descriptive language that one person or part of a community may prefer might be considered offensive or harmful by others. Consider carefully with the creator, donor, community, and other TUSC team members what subjects should be used if this situation arises.

If the authority source subject heading is found to be outdated, harmful, inaccurate, or to simply not exist due to the local nature of the subject, it may be appropriate to create local subject

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<sup>6</sup> Read more about how a [task force at the University of Oklahoma Libraries](#) successfully changed the Library of Congress’ subject heading from “Tulsa Race Riot” to “Tulsa Race Massacre” (*Library of Congress Accepts OU Libraries’ Proposal to Change Subject Heading to ‘Tulsa Race Massacre,’* 2021).

headings. Review the subject headings to be created locally with a teammate or supervisor – no local subject headings should be created in a vacuum.

### 4.3 Geographical Subjects

Geographical names are used and created to describe geographic locations to identify areas where people live today, locations in the past, and locations being studied by geographic information scientists (or in, as the field is known, GIScience). The Proceedings of the National Academy of Sciences of the United States of America (PNAS), the United States Board on Geographic Names, and even the Society for Microbiology have initiatives to support social justice efforts in GIScience.

Make geographic names more ethical, inclusive, and accurate; prevent a lack of representation by acknowledging locational privacy and cartographic integrity; and make sure that data is more empathetic by following what the Proceedings for the National Academy of Sciences of the United States of America (PNAS) calls the *3es*: empathy, ethics, and equity.

Associating location with disease and virus names can be inaccurately misinterpreted, sometimes locations in these names do not accurately reflect and can miscommunicate where the disease or virus originated, how and where it is transmitted, or who is responsible for it (Champagne, 2021).

Do not use names that are outdated, derogatory, racist, insulting, inaccurate, and non-representative or non-self-descriptive of people and communities who occupy them. For example, these names are being removed from usage and are not acceptable in the GIScience and medical profession: Squaw<sup>7</sup>. Other examples include the use of “China or Wuhan virus” for COVID-19 virus<sup>8</sup>, and “Philippine Insurrection” for Philippine-American War.<sup>9</sup>

### 4.4 Ethical Use: Understanding Culture, Identity, and How to Use Subjects’ Names and Terms

Understanding a subject’s culture, identity, and how and to what extent they use their name(s) or terms to describe them are all key elements to creating inclusive, reparative, and ethical descriptions in authorial identity management. Cultural competency and compassion are needed to utilize descriptions that are respectful to human life, privacy, and consent, weighing it above the need to commodify information and its access.

Understanding the intersectional nature of these attributes will help to reduce racist legacy vocabulary originally created by European colonizers for a white system of information management. Trusting subjects to self-describe and/or self-identify will improve the quality of privacy, confidentiality, and consent. It shows respect for individual and cultural autonomy, authenticity, and ultimately can help to improve the accuracy and ethical quality of linked data and other controlled vocabularies.

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<sup>7</sup> See <https://www.doi.gov/sites/doi.gov/files/elips/documents/so-3404-508.pdf> to read Order No. 3404 declaring “Squaw” a derogatory term and implementing procedures to remove the term from federal usage.

<sup>8</sup> See <https://medicine.yale.edu/news-article/calling-covid-19-the-wuhan-virus-or-china-virus-is-inaccurate-and-xenophobic/> for more information on these terms.

<sup>9</sup> See <https://history.state.gov/milestones/1899-1913/war> for more information on these terms.

Cultural competency is needed to utilize descriptions that are respectful to communities, human life, privacy, and consent. Communities with expertise on certain subjects will be an important source for updated and inclusive subject headings. Working with communities requires balancing community expertise with our local rules for creating standardized subject headings. It must also be recognized that community-identified subject headings may not encompass comfortable terms for all people within that community or may encompass terms that have been identified as harmful at some point in time. For example, 'Queer' is a reclaimed term that many LGBTQ+ people prefer, while others are uncomfortable with the term's history as a slur.

Trusting subjects to self-describe/identify will improve the quality of privacy, confidentiality, and consent. It shows respect for individual and cultural autonomy, authenticity, and ultimately can help to improve the accuracy and ethical quality of linked data and other controlled vocabularies. The definitions for culture, identity, and names below are all relevant to how both subjects and agent names are determined or used.

- *Culture* can be described as the customs, arts, social institutions, and achievements of a particular nation, people, or other social group.
- *Identity* is a specific set of beliefs and qualities that structure an individual or a group.
- A *name* is a word or phrase that distinctly designates a person or thing. Agents can have several names that can be inactive or simultaneously active depending on their identity and culture.

These components can be fluid, overlap, and change at any time. Because of this, the best way to create inclusive, reparative, and accurate descriptions and to know when and how to use a subject's name is to allow for self-description and to utilize communities that are related to the subject for descriptive context. Supporting inclusivity and diversity means that intersectional identities should be accommodated regardless of standards and informed consent should be practiced.

#### 4.4.1 Privacy and Consent

Creating visibility can seem like a positive way to increase access to diverse collections, however, privacy, confidentiality, and consent need to be considered and granted when identifying subjects and using their name(s). Take special care when identifying marginalized and/or underrepresented communities, and anyone who may be classified under the protected classes of citizens.<sup>10</sup>

Consider how associating names or linking all a subject's names can be potentially dangerous. For example, a subject who identifies as LGBTQ+ who is not out in their community, linking dead names or deadnaming an trans individual,<sup>11</sup> an underaged subject who requires parental consent, activists who may be in danger if identified in protest images, or a woman from a culture that punishes rape victims could be harmed if publicly identified in archival materials.

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<sup>10</sup> Protected classes of citizens include: children/minors, cognitively impaired persons, prisoners, pregnant or lactating women, blind individuals, military personnel, wards of the State, institutionalized individuals, non-English speaking individuals, and other participants whose life circumstances may interfere with their ability to make a free choice in consenting to take part in research.

<sup>11</sup> For more on deadnaming, see <https://homosaurus.org/v2/deadnaming>.

Become familiar with laws protecting subjects' personal information at a state and federal level and become familiar with protected groups identified in those laws: race, color, national origin, religion, age, sex (gender), sexual orientation, physical or mental disability, and reprisal.

#### 4.4.2 The Right to Be Forgotten

The extent of a subject's consent can change over time. For example, subjects who gave consent to be filmed or photographed before the Internet would have no knowledge of how accessible and transferable files would be in the future. Consent should be reestablished to encompass the replicative and therefore permanent nature of data published online. Consider reevaluating, reestablishing, and updating subjects' consent before publishing materials in a platform that did not exist during the time of the consent. Create and control access to the materials for personal use by researchers, but do not provide copies or allow researchers to duplicate or publish the materials if consent is not provided. Maintain the obscurity of participant names by not linking them to their likeness on film and do not make their identities public.

#### 4.4.3 Deceased Subjects and Orphan Records

There are instances where self-description may be difficult to account for because the subject is deceased, or unknown and/or unlocatable (orphan record). In the United States, privacy rights erode after death and posthumous privacy can be difficult to determine or pinpoint. Maintaining confidentiality for unknown or deceased creators may be neutralized if the material is in the public domain.

- Legally, § 401.190 Deceased persons, does not consider disclosure of information regarding the deceased to be unwarranted, but care is taken to make sure information about the deceased does not infringe on the privacy of the living, § 401.115, or contains sensitive information about minors.
- For deceased or unlocatable subjects, conduct a review of the donated materials and prioritize how the subject self-describes within the context of their materials.
- Self-description can override any public instance, vocabulary resource, or outside commentary.
- Contact either experts about the subject or the subject's community to cross check information to get a better contextual understanding of how the subject described themselves.
- Consult vocabulary and authority control resources to better understand, cross reference, and identify descriptors that pertain to the creator.
- Problems with identifying the creators of orphan records lean more towards liability issues involving copyright and fair use.

#### 4.4.4 Protecting the Identity of Minors and Students

The records of individuals under the age of consent may be governed or federally protected. Below you will find general guidance on how to approach the protection of minors. See Appendix B for a case study about this topic.

- Obscure identifiers, redact, and/or seal records that contain information that may infringe on the privacy of the living.



- Provide access to the materials under discretion. For example, do not allow publishing or duplication by researchers and require researchers to sign a disclosure agreement.
- Check local and federal statutes regarding the privacy of minor's records.
- Become familiar with the Family Educational Rights and Privacy Act (FERPA), a law that gives parental guardians certain rights with respect to their children's educational records until the age of 18 and dictate what types of records and to whom educational institutions can share information with.
- Refer to CITI Program's Social-Behavioral-Education (SBE) Comprehensive course to learn more about how minor's personal records are protected (See Appendix A for more on this course).

#### 4.4.5 Ethically Identifying Incarcerated Individuals

According to the Handbook on Prisoner File Management published by the United Nations Office on Drugs and Crime, the management of prisoner files is a tool for human rights that strives for extreme accuracy when identifying the records of the incarcerated (United Nations Office on Drugs and Crime, 2008). This accuracy and transparency protect citizens who are not incarcerated. Under that same umbrella, this accuracy also helps protect formerly-incarcerated individuals as far as providing evidence and documentation of their experience in the prison system. What are the ethical boundaries for identifying former incarcerated individuals after their imprisonment? See Appendix B for case studies that may inspire thoughts on describing incarcerated individuals' inactive records when found in archival collections outside of prison records.

#### 4.4.6 Artists, Authors, Musicians, and Performers

Artists, performers, and musicians may have alternate names that are determined by the culture of their type of creative profession and specific to their individual identities. Catalogers should refrain from cyberstalking creators for the sheer purpose of filling out a record to its fullest extent and only use information that is already published.

- The Screen Actors Guild will not accept duplicate names, so actors are asked to come up with a few stage names they would want to use if their current name is already being used by another actor. Obviously, a byproduct of this is creating a veil of privacy between their stage and non-stage identities.
- Artists who create underground work such as zines and graffiti art, but also authors who use pseudonyms, may not wish to be identified or linked to their pseudonyms.
- Linking names without permission undermines and contradicts the concept (or simply, the creator's intended concept) of the "underground" and protest art as well as a creators' right to privacy.
- Names given by the artist or author for the work should be used, and no further investigation to link them to other work should be pursued unless under the wishes of the creator.

#### 4.4.7 Gender and Sexuality

Gender and sexuality must be identified on an individual level and by the subject using the subject's own terms regardless of vocabularies or available resources. Scholars with expertise or

appropriate community members and leaders who are knowledgeable about gender and sexuality and queer theory should be consulted as valuable resources. When naming and using identity and cultural vocabulary associated with LGBTQ+ individuals, privacy, consent, and confidentiality must be prioritized<sup>12</sup>.

Understanding specific definitions is a crucial step in the ethical and safe use of names and descriptions associated with transgender and gender diverse individuals. Subjects who identify as transgender or gender diverse need to be able to self-identify regardless of standardized labels, vocabulary, or terms and regardless of assumptions. Overzealous data linking should be prevented and repaired. Catalogers, memory workers, and archivists should allow gender diverse subjects true agency over their identities. Doing so will prevent further oppression and exclusion. See Appendix A for more information on published vocabularies and thesauri related to gender.

#### 4.4.8 Gender and Names for North American Indian and Indigenous Peoples

Indigenous cultures may include gender diverse identities that do not align with Western gender and sexuality definitions.<sup>13</sup>

Name authority records will not and may never accurately or ethically describe or identify tribal names and subjects when they are being created by record keepers who are not members of tribal communities nor in communication with tribal communities and their leaders.

Below are examples of basic characteristics and issues with Native American personal names based on Frank Exner's *Creating Identity- North American Indian Names and Naming* (2007).

- Naming traditions may differ from community to community and may not be applicable to indigenous or aboriginal cultures outside of North America.
- Names may follow English or European traditional form and can also follow North American Indian traditional name forms.
- Names can describe or tell an individual's story, can be autobiographical, or identify clan membership.
- Names can be mixed-form where a European given name is incorporated into a traditional Indian name.
- Individuals can have a mixed-form name at the same time as a traditional tribal name
- Specific names are used for different social expectations. Name that other community members use to identify someone can reflect the formality of the social request or occasion.
- Names can exist simultaneously and can be used interchangeably.

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<sup>12</sup> See "Demographic Characteristics in Personal Name Authority Records and the Ethics of a Person-Centered Approach to Name Authority Control", Chapter 4 of *Ethical Questions in Name Authority Control* (2019) for more about this topic.

<sup>13</sup> For more in depth discussion on this topic, see Chapter 5 of *Ethical Questions in Name Authority Control* (Sandberg, 2019) and Bowers and Keeran, "If You Want the History of a White Man, You Go to the Library: Critiquing Our Legacy, Addressing Our Library Collections Gaps (2017)." [https://digitalcommons.du.edu/libraries\\_facpub/24/](https://digitalcommons.du.edu/libraries_facpub/24/)

- Names and name sequences can change overtime and names can be specific to a specific time in an individual's life, for example, a name given at birth, a name given at youth, a name after an event, a name given to an elder that is [auto]biographical.

#### 4.4.9 Western Women's Names in the United States

When using women's names in archival records, consider male bias in Name Authority Records. In Western white culture, men's surnames are often prioritized over women's names and identities. In special collections, this invisibility of Western women's names and identities because of marriage can create access problems for researchers who are tracing genealogical roots or trying to locate records of women before they were married. In many instances, women's names are reduced to merely the married prefix (ex, Mrs.) accompanied by any length or version of their husband's name. Unfortunately, this is often the only known information for the subject, so it is impossible not to utilize it or to elaborate on it.

Non-married women's names can also pose access issues. For example, the only instance of a woman's name is sometimes abbreviated to a prefix and their maiden name or even just their first name as the only identifying information. See Appendix B for case studies on this topic and below for general guidance:

- Women should be able to self-identify at the time of acquisition via deed of gift.
- Creators and sources can ultimately override outside descriptions, however, working closely with family and community can help with deeper understanding of context and extent of a subject's identity if they are not present.
- Complying with the wishes of the donor is strengthened when the family or community members are [legally] put in charge of donating materials by the actual source or creator of the records.
- Living donors should have the ability to request that identifiers be updated, materials be redacted, and sensitive materials be obscured as needed or as indicated by a deed of gift or memorandum of understanding.
- Other races and cultures that were forced to assimilate into white Western culture because of colonization, may have adapted these traditions in postcolonial, post-Civil War times.
- When identifying women of color in collections, a scholar with expertise in women's studies or gender and sexuality should be consulted for accuracy and context.
- Catalogers and archivists should understand and recognize when women are managing their identities through naming and when their agency is being undermined by standardization.

Manifestations of identity management and exacting autonomy may include:

- Obscuring identifiers that may be seem comfortable for cis gendered white people to disclose
- Using male, female, nonbinary, gender neutral pseudonyms
- Choosing pronouns
- Controlling the use of capital or lowercase letters in their name instance
- Dropping and adding names

- Legally changing names
- Dropping traditional prefixes like Miss, Ms., and Mrs.
- Choosing to include or hyphenate spouse surnames
- Utilizing prefixes not associated with spouse and utilizing suffixes that emphasize academic degrees or certifications.

#### 4.4.10 Describing and Identifying Enslaved Individuals

Archives for Black Lives in Philadelphia: Anti-Racist Description Resources<sup>14</sup> has several examples and case studies on how to approach reparative descriptions of slavery records in special collections (Society of American Archivists, n.d.). See Appendix B for a case study on this topic. Below are some guidelines about describing records related to slavery and the enslaved:

- Understand that records of enslaved people may be incomplete and consist of documents where there is more accurate information about captors rather than their victims.
- When possible and/or if provided, use names that the enslaved used to refer to themselves.
- For name authority files, watch out for incorrect and dehumanizing details associated with names. Archives for Black Lives in Philadelphia Anti-Racist Description Resources guide uses an example where a purchase date was associated with an enslaved person's name authority record.
- In situations where an original order is necessary, try to add notes to explain how the arrangement follows outdated, racist bureaucratic logic and add extra descriptions to create visibility for enslaved persons.
- Most importantly, when possible, promote and create visibility to enslaved people when they are identified in collections.
- Check dates associated with names to make sure they are appropriate when using Name Authority Files and other legacy descriptions.

## 5 Transparency and Reparative Description

### 5.1.1 Transparency

If a finding aid has been revised in any way to address harmful language, be sure to indicate the revision either in a Processing Information note or in the Revision History section of the finding aid in ArchivesSpace. The components of this note should include when the revision was made and by whom; what kind of action was taken (revision, contextual note); how to access previous versions of the finding aid. For example, a revision note can read:

- This finding aid was revised in 2022 by FirstName LastName. Language was reviewed and changed to adhere with current reparative and inclusive practices. Terms, including

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<sup>14</sup> See page 9 of *Archives for Black Lives in Philadelphia (A4BLiP) anti-racist description resources*.

X, X and X were changed to X, X, and X, respectively. To view an earlier version of this finding aid, contact Tulane University Special Collections [email].

### 5.1.2 Version History

Always save a copy of the original, unedited finding aid (ideally both a PDF and an EAD file). This will become a record of the collection's history and may be useful to researchers; it is also documentation of why the decision to revise was made.

When remediating a finding aid for outdated and harmful terminology, keep notes and references listed in a centrally located folder and create draft revisions before making changes directly in ArchivesSpace.

## 6 Conclusion

Maintaining access to archival material as the landscape of appropriate language changes is important. Creating difficulties for researchers is not the intention of developing inclusive and reparative policies and projects. Therefore, it is imperative for archivists to be transparent about the changes being made to description and metadata during such projects, and to document any such changes that are made.

As well as documenting any edits, archivists should also document who is making the edits and the dates of revision. As more scholarship is published and our understanding of inclusive and reparative description expands, it is important to review previously-made edits to make sure they are still meeting current standards.

Additionally, archivists must communicate how and why such reparative work is being done to colleagues, fellow archives professionals, and to the users of their repositories. Different methods might be helpful in communicating these changes, such as walkover charts for metadata updates, educating Research Services staff members about collection updates, utilizing linked data and inclusive controlled vocabularies such as the Homosaurus, and maintaining version histories of ArchivesSpace records.

Inclusive and reparative description will continuously be an ongoing effort for archivists. It is important to remember that language is not static, and as language evolves so must our practices. It is the sincere hope of the I/R Working Group that this document be used as a guiding framework for inclusive and reparative practices at Tulane University Libraries, and we commit to maintaining this document to the most current standards of this work.

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## APPENDIX A

### Resources and Further Readings

#### Terminology and Style Guides

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### **Inclusive and Reparative Description Projects**

Descriptive Equity and Clarity Around Blackface Minstrelsy in HTC Collections <https://www.dorothy-berry.com/minstrel-description>

UNC Greensboro Reparative Archives Project <https://uncg-lis.libguides.com/uncgRAWG>

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## APPENDIX B

### Case Studies

#### 4.4.4 On Protecting the Identity of Minors and Students Case Study

*Wisconsin School for Girls Inmate Record Books: A Case Study of Redacted Digitization* published in the *American Archivist* is an example of how postmortem reputation consideration was dealt with by an archive. In the study, Willey and Farley describe how Wisconsin state statutes mandated restrictions on these inmate records to protect the identities of juvenile females who were abused by the public system as well as their families who subjected them to neglect, prostitution, physical violence, and then later committed them to the “school”. The Wisconsin School for Girls collection managers working with these juvenile records followed two state statutes and one US Code: Wisconsin Statutes Chapter 48-The Children’s Code, [WI Stat § 48.78 \(2015\)](#); Confidentiality of Records and 2012 Wisconsin Statutes & Annotations 16. Department of administration.16.61 Records of state offices and other public records WI Stat § 16.61 (2012 through Act 45); and Title 18 of US Code on Juvenile Records, 18 U.S.C. 5038 - Use of juvenile records.

#### 4.4.5 On Ethically Identifying Incarcerated Individuals

Digital Panopticon’s digital project, *Tracing London Convicts in Britain & Australia, 1780-1925* raises some ethical questions in making convict records from 1780-1925 searchable online, however, it is unclear where creators of this resource stand regarding the questions raised or what their stance is about providing this information.

The American Prison Writing Archive, Hamilton College, collects and digitizes firsthand accounts of prison life in America from prisoners and prison staff. Because of the contemporary and ongoing nature of this collection, the archive has set rules regarding how participants identify themselves for safety reasons. For example, the archive asks that participants submit essays anonymously, using a pen name that is not their nickname, to omit any instances of their actual name(s) in the work and submission form, and to use made up names for real individuals who may have roles in their account.

Another notable initiative to help protect the incarcerated is Ban the Box Legislation or Fair Chance Legislation. This legislation is intended to help rehabilitate ex-convicts by making it easier to get a job or attend school.

#### 4.4.9 On Western Women’s Names in the United States

1. The Newcomb Archives digitization and publication of the Newcomb College Oral History Collection is an example where broken links between women’s single and married names created access issues. Interviewees sometimes only refer to themselves by their married names which made it difficult to locate images of them in the Jambalaya to add to their oral history in the digital repository. Consent forms collected at the time of the interviews were sometimes incomplete offering no additional information to contribute to link interviewees with their school identities. Some useful tactics to help match women’s maiden names included utilizing graduation dates and specific campus activities mentioned in their

- interviews and consulting with the Newcomb Institute Alumni Coordinator who has ties to the Newcomb College alumni community. In hindsight, self-description should be captured at the consent form level. Ultimately, for the digital collection's descriptive metadata, when possible, the interviewee's entire name (middle, maiden, and married names) was used in the title field, with a summary of their educational and post educational careers and status summarized in the abstract/description element based on content from interview audio. Library of Congress Name Authority Files were linked for cis gendered white alumni in the digital collection who are nationally recognized.
2. Yale's Reparative Archival Description's Group (YRADG): ArchivesSpace Agents Reparative Task Force Working Group for Women's Names has a useful list of formats or categories that married women's names can take. YRADG found these categories after running a query in ArchivesSpace records to identify agent records where Mrs. or Miss is present in a name.
    - Women identified by "Mrs. [Husband's Name]" only (e.g., Mrs. Charles Healy)
    - Women who were identified by "Mrs. [Husband's Name]" in conjunction with their full name (e.g., Agnew, Jane (Mrs. Charles D.))
    - Women who were only identified in conjunction with their husband, and therefore needed a separate agent record created (e.g., Feld, Mr. and Mrs. Stuart)
    - Women who were identified only by their surname (e.g., Abrams, Miss)

YRADG also lists several useful resources that can help identify women and that were used to conduct a project to identify women's names:

- Ancestry.com: Searching on Ancestry uncovered full name information through vital records. This was particularly helpful when searching for donors who often did not have biographical information located elsewhere.
- Archives at Yale and Orbis: Our interfaces for searching Yale's finding aids and catalog records were helpful in uncovering any other biographical notes that would not have been linked to an agent record.
- Findagrave.com: We frequently used this resource to uncover full name information either through the Find a Grave records themselves or through images of the headstones. This site is particularly helpful as it links spouses together.
- Legacy.com: This site provides a database of obituaries in which full name information could often be identified.
- Library of Congress Name Authority Files (LCNAF): If the person had an authorized heading, we were often able to locate full name information through their authority record.
- New York Times: The New York Times obituaries and marriage announcements often provided full name information.
- Newspapers.com: This resource would occasionally be the only place that marriage announcements or obituaries were published.
- Virtual International Authority File (VIAF) and Social Networks and Archival Context (SNAC) databases: may include variant names with full name information.

#### **4.4.10 On Describing and Identifying Enslaved Individuals**

In 2020, during the Covid-19 pandemic, many archivists created data and other digital projects that could be completed remotely during lockdown. Harvard's Houghton Library executed a large digitization project that emphasized their holdings of primary sources illustrating Black life

in the Americas from the 18th through early 20th centuries. Dorothy Berry's team faced some technical obstacles when trying to clean up and repair descriptions of these materials. Another obstacle was limited staffing. One solution was to create an interactive data set that could be used outside of finding aids and catalog records using a simple spreadsheet that categorizes potential search fields that could be used for faceting: Theme Tags, Physical Formats, and Genres. From this work, Berry's team were able to identify enslaved subject's names and age and add them to this data set.