

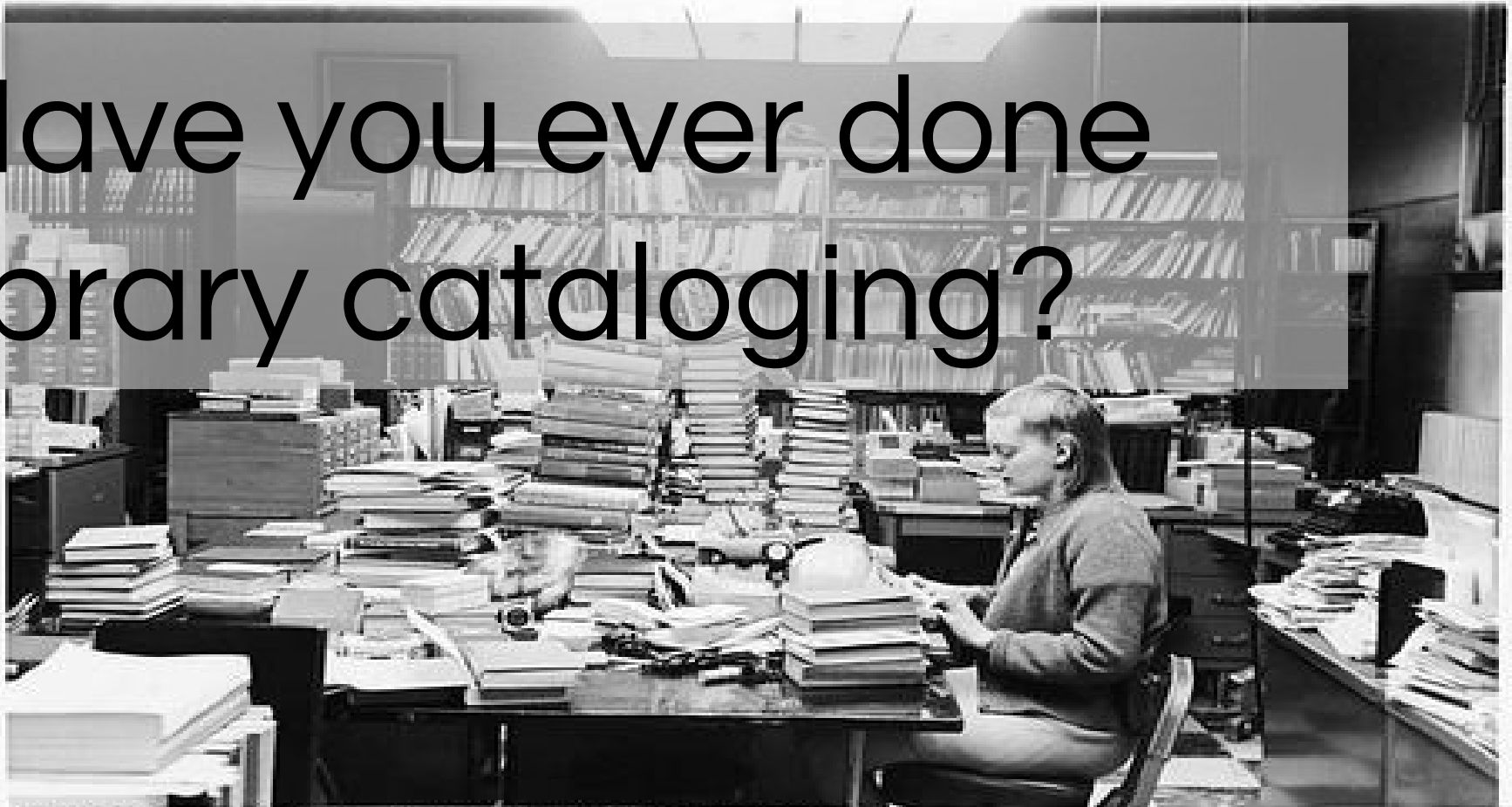
# Design for Diversity Forum

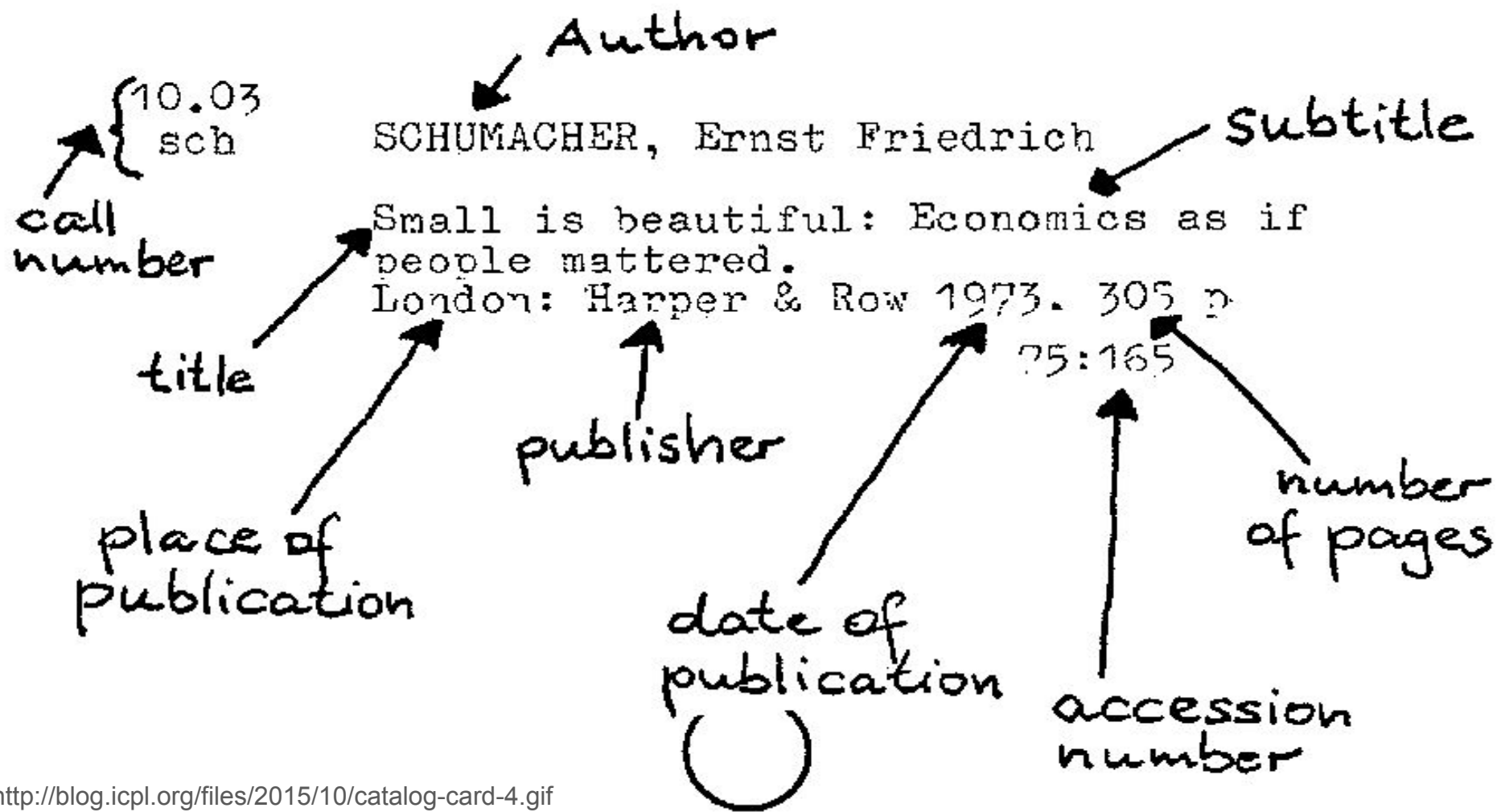
## **Case Study: Change the Rules**

October 16, 2017

Amber Billey  
Metadata Librarian  
[@justbilley](#)

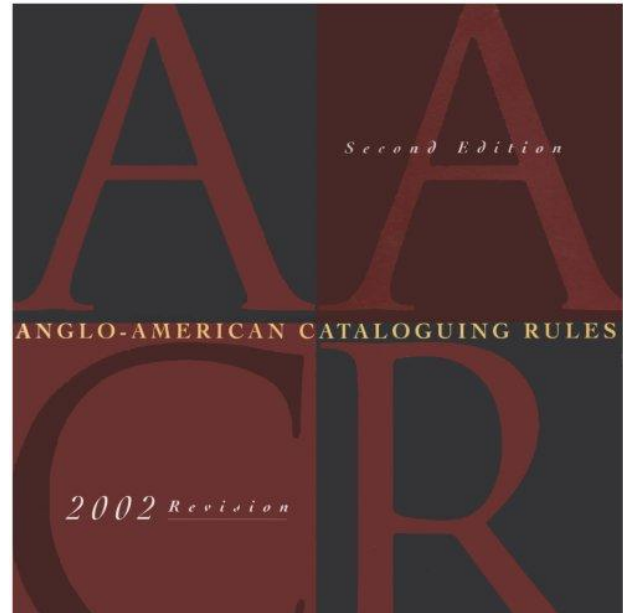
# Have you ever done library cataloging?





# Name authority records used to

- Identify
- Disambiguate
- Collocate



# Now we aspire to FRAD user tasks

- Find
- Identify
- *Contextualize*
- *Justify*

R | D | A

RESOURCE DESCRIPTION & ACCESS

## 9.7 Gender

### 9.7.1 Basic Instructions on Recording Gender

#### 9.7.1.1 Scope

*Gender* is the gender with which a person identifies.

#### 9.7.1.2 Sources of Information

Take information on gender from any source.

#### 9.7.1.3 Recording Gender

Record the gender of the person using an appropriate term from the list below.

female

male

not known

If none of the terms listed is appropriate or sufficiently specific, record an appropriate term or phrase.

intersex

transsexual woman

Indicate the source from which the information on the gender of the person was derived applying the instructions given under 8.12.

# LC RDA Training

2011-2013

“We're interested in knowing what your gender is--you know, **what's your physical equipment?** Not who you go to bed with.”  
[The trainer] goes on to explain how to make a “**safe assumption**” of someone’s **gender based on their name and biographical** information.

(Billey, Drabinski, Roberto, p.3)

# Gender, RDA style

- literally embodied
- easily defined
- visually identified
- female, male, or empty data
- fixed, now and forever
  
- **But this has real-world ramifications**



# Looking at trans\* NARs

- 65% of NARs for trans\* authors analyzed contained some form of **outing** information
  - Multiple 375 fields
  - Trans\* terms used in the 375
  - Trans\* identity indicated elsewhere in the NAR (670)

**We needed to advocate and  
change the rules  
to be more inclusive.**

# Advocate: Publish (2014)

- Bring attention to the issue to the profession.

Billey, A., Drabinski, E., and Roberto, KR. "What's Gender Got to Do with It? A Critique of RDA 9.7," *Cataloging & Classification Quarterly* 52, no. 4 (2014).

# Changing RDA 9.7 (2015)

- FastTrack Proposal submitted to JSC to add “transgender” as an official term to the RDA vocabularies (Summer 2015)
  - Accepted “umbrella term” for the trans\* community
  - Promotes controlled vocabularies and collocation
- The proposal was deferred and the broader issue was discussed at the JSC (now RSC) Nov. 2015 meeting

# Changing RDA 9.7 (2016)

- New Fast Track proposal submitted by the JSC (now RSC) to deprecate the entire controlled vocabulary for Gender and redefine the element.
  - To support internationalization of RDA
- This new proposal was accepted in February 2016!

# The new RDA 9.7!

## 9.7 Gender

### 9.7.1 Basic Instructions on Recording Gender

#### 9.7.1.1 Scope

[Gender](#)▼ is the gender with which a person identifies.

#### 9.7.1.2 Sources of Information

Take information on gender from any source.

#### 9.7.1.3 Recording Gender

Record the gender of the person, using an appropriate term in a language preferred by the agency creating the data. Select a term from a standard list, if available.

Record gender as a separate element. Gender is not recorded as part of an access point.

# Why still record gender at all?

- It's one important way to organize and identify people (whether we like it or not)
- Disambiguation is still an issue
  - Non-roman character transliteration
  - “Unisex” names

New instructions need  
new best-practices.



# PCC Best Practices (2016)

- Report of the PCC Ad Hoc Task Group on Gender in Name Authority Records
  - Interprets the rule and recommends how to apply it, as well as additional controlled vocabularies to source affirming identity labels
  - \$2 homoit

- **2011** - RDA Published. First time catalogers are being asked to record gender in Library of Congress Name Authority Records (NARs)
- **2013** - LC adopts RDA and publishes training videos and materials that reinforces regressive gender binary terms and practices in NARs
- **2014** - Billey, Drabinski, and Roberto publish paper critiquing LC/PCC practice of recording gender in NARs
- **2015** (June) - Fast Track proposal submitted to RDA Steering Committee to change the rule
- **2016** (February) - A modified rule to record gender was accepted by the RDA Steering Committee and published
- **2016** (October) - Program for Cooperative Cataloging publishes best-practices on how to apply RDA Instruction 9.7 Recording Gender for Persons

**Let's review (the 5 year effort)**

# RDA 9.7 Next Steps

- Librarians are encouraged to **correct the information** found in name authority records.
- Add new inclusive terms for gender in the LCDGT
- Investigate the need for a special group to handle NARs for queer and trans\* individuals
- Investigate leveraging publisher's online author questionnaires
- Investigate the impact of open linked data and the shift to identity management

# Lessons learned

- Changing rules takes time and patience to navigate complex organizational and committee structures
- A local issue may reveal global impact
- Work within the system
- Expand your options
- Change the system

# Acknowledgements

- Fast-Track Proposal Group
  - Jason Dean & Shana McDanold
- PCC Ad Hoc Committee
  - Matthew Haugen
  - John Hostage
  - Nancy Sack
  - Adam L. Schiff
- Special thanks to Paul Frank at LC, and Kathy Glennan of RSC, and of course Emily Drabinski & KR Roberto

# References and Resources

Billey, A., Drabinski, E., and Roberto, KR. "What's Gender Got to Do with It? A Critique of RDA 9.7," *Cataloging & Classification Quarterly* 52, no. 4 (2014).

Thompson, K. J. "More Than a Name: A Content Analysis of Name Authority Records for Authors Who Self-Identify as Trans," *Library Resources & Technical Services* 60, no. 3 (July 2016).

Report by the PCC Ad Hoc Task Group on Recording Gender in Name Authority Files, October 2016. <http://bit.ly/pccgender>

**“We have the opportunity to  
accurately represent  
authors as they  
choose to be known.”**