

Minutes (Draft)  
96<sup>th</sup> Annual Meeting  
Listening to Many Voices: Ethics in Technical Services

Friday, October 16, 2020, 10:00 am—3:30 pm

Held Virtually at the Following URL:

<https://ptpl2020.learningtimesevents.org/auditorium/>

The 96<sup>th</sup> annual meeting of the Potomac Technical Processing Librarians (PTPL) group (and the first held virtually) was broadcast beginning at 10:00 am. Registration and logistics were handled by Learning Times (<https://www.learningtimes.com/>). All registrants were provided an individual link to the conference page prior to the meeting, allowing them to join the event using the Zoom videoconferencing software and to leave and re-enter the meeting as needed. The event began with remarks from PTPL board chair Kim Edwards, who thanked everyone for attending.

#### Session One: Critical Cataloging Power Hour

Speakers: Heidy Berthoud (Smithsonian Libraries), Whitney Buccione (University of Virginia), Violet Fox, David Heilbrun (George Mason University)

#### Speaker Bios:

Heidy Berthoud (Smithsonian Libraries)

Heidy Berthoud is the Head of Resource Description at the Smithsonian Libraries. She serves on the National Museum of Natural History IDEA Advisory Council; the FAST Policy and Outreach Committee; and the NASIG Program Planning Committee.

Whitney Bucciccone (University of Virginia)

Whitney Bucciccone (she/her/hers) is the Head of Technical Services for Special Collections at the University of Virginia. Previously, she was the Special Collections Cataloging Librarian at the University of Washington in Seattle. She began her career holding multiple paraprofessional cataloging positions at the Lilly Library, Indiana University Bloomington. She holds two Masters degrees: one in Library Science and the other in Arts Administration. Her research interests include all topics related to technical services, special collections, and library management/administration.

Violet Fox

No bio provided.

David Heilbrun (George Mason University)

No bio provided.

#### Presentation

Violet Fox, acting as host of this panel, began the presentation by introducing the team, who would be giving separate, but related presentations on concepts related to critical cataloging. She discussed the definition and history of critical cataloging, beginning with the well-known work of Sanford (Sandy) Berman in the 1960s and 70s. Berman worked toward changes in biased LCSH headings, penning

*Prejudices and Antipathies: A Tract on the LC Subject Heads Concerning People*, which serves as an inspiration for those engaged in the work of seeking changes in the LCSH terminology describing marginalized persons. Fox wished to acknowledge that everyone on this panel of speakers is white, which, while unsurprising given that 87% of librarians are white, is inherently problematic. As her last point before yielding to the next speaker, Fox underlined that your library catalog and classification choices represent your library to your patrons and the outside world, and that decisions that are made in the “back room” of our libraries are just as important to your library’s public image as your library’s programming or displays.

The next speaker on the panel was David Heilbrun. He introduced himself as a librarian new to the profession who works with both digital and traditional collections. Speaking briefly on the differences in his experiences with MARC and RDA and Dublin Core, he expressed that he felt that the standards of traditional cataloging, MARC and RDA, were very exacting and set in stone, whereas Dublin Core and its variants he found to be more free-form and adaptable. Heilbrun presented the audience with a list of works cited, which included the aforementioned Berman text *Prejudices and Antipathies*, as well as Hope Olson’s *The Power to Name* and Emily Drabinski’s “Teaching the Radical Catalog” and “Queering the Catalog.” With regard to Berman, he pointed out that in addition to his work to change more widely-used LCSH, Berman also created and maintained a variety of local headings for the library in which he worked, much like many librarians are doing now. Heilbrun further cited Tina Gross’s SACO work on “illegal aliens” LCSH and the associated documentary *Changing the Subject* as influential to his work.

Heilbrun then moved onto his main topic: local subject headings and reclassification projects. Though interested in implementing the “illegal aliens” changes proposed by Tina Gross, he expressed disappointment that technological limitations had as yet kept Emory University from adopting the revised “undocumented citizens” headings. While he stated that this is still something they would like to pursue when possible, they had turned their attention to a more immediately attainable project: updating the call number for those works in the catalog using the .N3-.N5 topical cutter. Notes on this process were shared online through Violet Fox’s Cataloging Lab website at the following URL: <https://cataloginglab.org/kb/replace-n4-cutter/>

Heilbrun is also working on a project centered on ethics in local name authority records. As an inspiration for this work, he cites *Ethical Questions in Name Authority Control*, published by Library Juice Press. As part of a NACO funnel, George Mason is creating local policies that govern the creation of authority records, seeking to “do no harm” by including only that information which is necessary to distinguish the author from others unless explicit permission is provided by the individual in question. Particular attention was paid to the inclusion of gender as a part of the authority record; at the time of this meeting, it was George Mason’s policy to never include this information. Heilbrun wrapped up his section of the presentation by reiterating that it is important to have frequent discussions about the ethical considerations of cataloging and to acknowledge the biases that are still being perpetuated today.

The presentation was then turned over to Heidi Berthoud, who began her talk by speaking on a project recently undertaken by the Smithsonian Libraries while its staff were teleworking due to Covid-19: modeling African ethnic groups in Wikidata. Prior to this project’s inception, the Smithsonian was already using thousands of local subject headings to enhance the descriptive metadata for materials in the field of African art, including specific terminology and over 300 African ethnic group names. Seeing

an opportunity to share this field-specific knowledge outside of their traditional library catalog, Berthoud collaborated with Janet Staley, branch librarian for the Warren M. Robbins Library at the National Museum of African Art, to build a metadata application profile with the intent of making these items discoverable through Wikidata and SPARQL queries. The intent with this project was not to reproduce the metadata already available through the library catalog, but to take advantage of the triple structure of Wikidata to highlight relationships between terms within the field of African art and to make hidden dynamics (such as colonization) explicit. Though this project was in its infancy, Berthoud anticipated it could open the door to other projects leveraging the metadata created by different museum departments in a meaningful way. The draft project plan for this project can be accessed at the following link:

[https://www.wikidata.org/Wikidata:WikiProject\\_PCC\\_Wikidata\\_Pilot/Smithsonian\\_Libraries/Projects/African\\_Ethnic\\_Groups](https://www.wikidata.org/Wikidata:WikiProject_PCC_Wikidata_Pilot/Smithsonian_Libraries/Projects/African_Ethnic_Groups)

Berthoud then turned her attention to the larger question of what a library catalog *should* be. In working with the many departments in the museums that regularly work with metadata, as well as in her capacity as co-chair of the National Museum of Natural History's Inclusion, Diversity, Equity, and Accessibility Council, she has had many discussions on this topic with a variety of constituents. In her presentation slides she provided a list of common themes she gathered from these conversations: the library catalog should embody truth telling, openness, reconciliation, sensitivity, justice, cultural ways of knowing, respectful and inclusive documentation, restitution, reckoning, and repair. At present, the catalog is not yet there, and the widespread creation and adoption of specialized vocabularies in the Smithsonian museums is a testament to the inadequacies of currently available standards. Berthoud closed by underlining that we need to own up to our history, as the United States, as institutions, and as a profession, and that the catalog shou

Whitney Buccicone then took the helm to speak about the reparative work she and her department have been doing at the University of Virginia's Special Collections Technical Services department. For an in-depth discussion of the definition and aims of reparative archival work, she recommended Lae'l Hughes-Watkins's 2018 article "Moving Toward a Reparative Archive: A Roadmap for a Holistic Approach to Disrupting Homogenous Histories in Academic Repositories and Creating Inclusive Spaces for Marginalized Voices." In her presentation, Buccicone made particular note of the following passage: "The building of a reparative archive via acquisition, advocacy, and utilization can assist in decolonizing traditional archives and bringing historically oppressed voices in from the margins."

Upon joining the staff at UVA as the head of Special Collections Technical Services, Buccicone was tasked with creating an action plan for reparative work, which she described as combating years of dedicated denial and complicit ignorance of the voices in their archival collections. As the manager of a unit of nine (with three vacant positions, at the time subject to a hiring freeze,) Buccicone emphasized the importance of getting buy-in from all involved with these projects, making sure to consider the feedback of her team when making decisions that would impact their daily work. A guiding principle of hers is to never assign work that she could not or would not do herself. She noted that her team is all white, cisgender women, and that the team tries to be cognizant of their inherent biases while performing this important work.

During the planning process, Buccicone's team brainstormed and researched reparative work to understand the greater context and to help visualize what they needed to change about their daily

work. They met multiple times online to determine what needed to be done until the team came up with a finalized plan, which they called the UVA SC-TS Inclusion and Reparative Action Plan (IRAP). The next steps in this plan are to meet with the rest of special collections to get feedback, but Buccicone noted that this is not the only step of the plan where feedback will be collected. The IRAP has 13 action items focusing on redescription, improving access, creating and enhancing authority records, as well as constructing dedicated workflows and documentations to support the work and future work.

During the pandemic, UVA needed to find remote work for their students, and Buccicone had the idea have these students work from a list of objectionable LCSH and find references to them in Libguides that would need updating. After finding over 700 results, they created a report to prioritize which collections would be updated first, and which could be placed farther down on the list. This also resulted in a joint bulk editing project between Special Collections Technical Services and Central Technical Services. Thus far, they have changed illegal immigrant LCSH to their recommended undocumented citizens versions, and plan to do the same with other headings in the future. Other plans to be implemented include creating finding aids to highlight underrepresented groups, improving classification schedules and reclassifying when appropriate, creating and enhancing authority records for underrepresented groups, and creating better training and documentation for staff. Buccicone also highlighted the creation of the Suggested Description Correction Form, a place where the campus and research community can have input on descriptive work by submitting proposed changes. She wishes to further collaborate with patrons in the future, and to perform user studies on their discovery platform to identify other places where change might be appropriate.

Fox returned to wrap up the presentation. With her final remarks, she thanked the other members of this panel for their participation. She encouraged the PTPL membership to continue to engage in discussions on these concepts online in such places as the Twitter #critcat hashtag, the RADCAT listserv, and the Cataloging Lab website at <https://cataloginglab.org>

## Q&A

Q. For Violet: where is the list of context statements that others have been working on?

A. The list was shared by Allison in the chat. There are two lists she has been collaborating on, one on bias in archives and library description, and a list of metadata departments mission statements. The links for these are <https://cataloginglab.org/list-of-statements-on-bias-in-library-and-archives-description/> and <https://cataloginglab.org/list-of-metadata-departments-mission-statements/> respectively.

Q. Regarding what David mentioned about replacing the N cutter in records, is there an established or recommended replacement for this heading?

A. Not that he is aware of. There is a question as to whether A for African American or B for black is appropriate, but there is no accepted standard. Heilbrun changed this to B5ish, which is detailed in the spreadsheet available via the Cataloging Lab website: <https://docs.google.com/spreadsheets/d/1eZLHdSSN1wJk6synjv8LvHDnNENIRAQkHST7DCrX3c/edit?usp=sharing>

Q. Would Heidi consider making predicates for colonialization terms in Wikidata?

A. Berthoud stated that it was something they considered, asking their partners at Wikimedia Deutschland. Wikimedia Deutschland recommended first doing the project in wikibase locally and then seeing how they could use existing statements to qualify wikidata items and experiment with that. They are open to submitting once they are comfortable with their structure.

## Break

Following this session, the meeting adjourned for a short break.

## “Calling Out” White Nationalism in Our Catalogs: Some Suggestions

Speakers: Isabel Quintana (Harvard University), Fred J. Hay (Appalachian State University)

Speaker bios:

Isabel Quintana (Harvard University)

I am a passionate proponent of cooperative endeavors, and especially of the PCC. I’ve been an active participant in NACO, SACO, BIBCO and CONSER for over 20 years. I have just begun my term as PCC Chair-Elect, and hope to find ways to further build community. I began my cataloging career in an anthropology library, and currently work primarily out of the Harvard Yenching Library, which is responsible for Harvard’s East Asian collections. I feel strongly that we should be diverse, inclusive, and welcoming in our collections and in our cataloging. I’m thrilled to see that librarians are tackling ethical issues, and am eager to be part of viable changes in our work. When I’m not cataloging, I have fun with my dogs, and cat. In fact, I typed this bio with a pug on my lap!

Fred J. Hay (Appalachian State University)

I earned the M.A. and Ph.D. in anthropology, focusing on the African Diaspora, and the M.L.I.S. I serve as the Anne Belk Distinguished Professor and Librarian of the W.L. Eury Collection at Appalachian State University. In addition to managing and growing an Appalachian library/archive, I teach Appalachian Studies. Prior to coming to ASU, I worked at St. Cloud State University, Kansas State University and Harvard University. (Isabel Quintana and I were colleagues at the Tozzer Anthropology Library.) I have served as Book Review Editor for C&RL and on the Editorial Board of Choice. I feel that as stewards of libraries and creators of library catalogs and finding aids, it is our responsibility to “call out” the racism found in our collections.

## Presentation

After a short break, Kim Edwards introduced the next two speakers: Fred Hay and Isabel Quintana. Fred began the presentation by noting that, despite the rejection of ethnocentrism being a foundational tenet of modern anthropology, the materials in many anthropology-focused library collections do not reflect this value. Some such materials may yet have value to researchers, in which cases withdrawing them may not be feasible. Instead, Hay argues that their offensive content should be “called out” within the library catalog, even if this would seem to contradict the principles of impartiality enshrined in cataloging instruction. To illustrate the severity of the harm these materials cause for library patrons, Hay provided several examples of racist passages in anthropological materials from the late 19<sup>th</sup> and early 20<sup>th</sup> centuries, connecting their claims to current medical maltreatment of African-American and Latino persons. Hay then turned the presentation over to Quintana.

Quintana began her portion of the presentation by acknowledging the influence that *Change the Subject* has had on her work. After viewing the documentary, Quintana was inspired to find a way to recognize

and mitigate the potential harm posed by keeping materials with racist content, but recognized that this could be perceived as at odds with the accepted norms of cataloging. The Subject Headings Manual discourages bringing personal values or judgments into cataloging, and making additions or revisions to headings can be seen as editorializing, resulting in situations such as what occurred with the proposed “Illegal Aliens” subject heading change. However, Quintana offered a positive counterexample in the successful change in heading from Mountain whites (Southern States) to Appalachians (People).

Reflecting upon how to enact these changes in our local catalogs, Quintana identified several potential options for distinguishing racist materials in the catalog, such as creating or updating LCSH/LCGFT, applying local subject headings or genre/form terms, and providing notes to warn the patron of the work’s offensive nature. For this last route, she provided a sample note: “This work contains material deemed to support white supremacist theories. Patrons may find it offensive. It is kept for historical purposes in this research collection.” Because the application of any of these methods relies upon cataloger’s judgment, Quintana worried that there may be difficulty in coming to a consensus on proposed changes and stressed that is important for catalogers to have additional training on implicit bias and white privilege. She also acknowledged that in a time where there are fewer and fewer catalogers to do it, this work and its related training represent an additional strain on already overextended departments. Quintana hoped that the profession would continue these discussions, despite the lack of easy answers, and continue to struggle toward a better and more inclusive catalog.

#### Q&A

Q: Regarding the potential issue of having librarians become forum moderators for their catalogs, how do you deal with patron tags?

A: Isabella stated that she had been wondering the same thing. She had seen it being discussed, but had not had experience with doing so personally.

#### [Black Subject Headings Matter Too: Engineering Discovery for a Black Comic Books Collection](#)

Speaker: [Stephen W. Holloway \(James Madison University\)](#)

#### Speaker bio:

Steven W. Holloway has been managing Metadata Strategies at James Madison University Libraries since Fall 2013. His MLIS is from University of Illinois at Urbana Champaign, with a concentration in data curation. Before that, he earned an MA and PhD from the University of Chicago in biblical and ancient Near Eastern studies. His current research focus is on decolonizing metadata, online identity management challenges, with digital humanities interruptions.

#### Presentation

Holloway’s presentation began by outlining an the ethical and pragmatic problem facing the library profession: as libraries create and curate minority-focused collections, we have an ethical obligation to detoxify the controlled vocabularies currently in use within our catalogs. This decolonization work must be accomplished without tokenizing the minorities it is meant to represent.

Holloway then described his experience in wrestling with these issues as he worked to determine appropriate subject vocabulary and authority record choices for James Madison University’s black comic books collection. The collection was focused on works by black publishers, works by black comic artists,

and works featuring black historical figures and black superheroes, and was intended to support African Diaspora studies. The materials were cataloged as item level records in a custom Dublin Core schema that utilized Wikidata URIs and presented to patrons in an individual Omeka instance, though Holloway noted that there were plans to convert these records into MARC 21 and to make them available through Primo and WorldCat as well.

When Holloway first began working with the collection and determining what access points to use in its records, the first idea that was discussed was to add Black or African-American to those access points (for example, changing “Vixen (Fictitious character)” to “Vixen (Fictitious Black character.) However, Holloway found that adding this demographic distinction to the main subject heading had the unintended result of reducing the character to a single descriptor, and further othering the characters from the white, male defaults of LCSH, and so did not implement this practice. As an alternative, he next considered embedding the information in authority records. There is support placing for demographic group information in the repeatable 368 \$c (“Other attributes of a person or corporate bodies, other designation”), and the 386 \$a (“Creator/Contributor characteristics”), as well as 370 for “Associated Place,” 372 for “Field of Activity,” and 374 for “Occupation.” As an examples of what can be done with authority records, he displayed screenshots of demographically enhanced name authority records for the comic book character Black Panther, black comic book artist Orrin C. Evans, and boxer Muhammad Ali. However, though enriching authority records in this way had promise, Holloway noted that this effort was stymied by the lack of support for authority record indexing in common library discovery tools. Therefore, there was no practical way to integrate this data into most out of the box discovery systems.

With that in mind, Hollowell turned to web-based tools such as SNAC and Wikidata. SNAC (Social Networks and Archival Context) offers some demographic tagging functionality, allowing users to search on terms such as “African American singer.” This demographic information is also embedded in Wikidata, although it is not readily accessible using the Wikidata UI. In order to access it, users must use SPARQL queries or tools like SQUID.

Holloway outlined JMU’s current strategies for making their black comics collection discoverable. For each record, they included available access points such as LCSH black superhero demographic group headings, added relevant place names, and used LCNAF headings for comic book characters when available. To further enhance these records, they added Wikidata URIs to character and contributor names, with the hope that they can develop an Alma API extension to consume them. They were also adding 590 local note fields to include those demographic notes that were otherwise undiscoverable using current discovery tools. To conclude, Holloway stated that while we cannot cure racism with applied metadata, we can avoid adding to the damage by tokenizing minority communities.

#### Q&A

Q: Are these projects demographically identifying white individuals as well, so as not to leave white as the default in LCNAF/LCSH?

A: Holloway acknowledged that this is an issue but stated that he had not done so. If working with a collection centered on whiteness, he stated that this is something he would do.

Q: Regarding indexing and searchability, would Marc 386 be an alternative?

A: Holloway said that the field would be appropriate, but it would have the same discoverability issues, and that Wikidata seemed like a better solution to him.

### Breakout Discussions and Lunch

Following this presentation, the attendees separated into breakout rooms to discuss the morning's presentations. Rooms were randomly selected by Learning Times. After fifteen minutes, the breakout rooms were adjourned for lunch.

### The Future of Patron Privacy: A Survey of Federal Data Protection Laws and GDPR Compliance Implications for U.S. Libraries in the Era of COVID-19

Speaker: Michael Teresa Mellifera (Catholic University of America)

#### Speaker bio:

Michael Teresa Mellifera is in her final year of earning her Masters of Library and Information Science at The Catholic University of America in Washington, DC. She will graduate in May 2021. She currently works as a Graduate Fellow at the University Honors Program and is fulfilling a law library internship at the Federal Communications Commission Library, which is a federal library focusing on communications law and regulations related to radio, television, wire, satellite, and cable across the United States. Michael is glad to report that she has in fact taken a full course in cataloging and classification as part of her library school curriculum!

#### Presentation

Mellifera began her presentation by discussing the ways in which technical services librarians frequently encounter patron data. She pointed out how, as early adopters of digital recordkeeping, libraries have long been engaged in large-scale efforts to collect, retain and analyze library data to improve systems, services, and collections. In an increasingly digital environment, Mellifera asserted that keeping current with data protection legislation and being aware of potential data breaches and intrusions was necessary to ensure that libraries continued to act in line with their stated professional ethics on patron privacy. She displayed a list of many high profile data breaches that had happened in recent history, including an Adobe breach in 2013 in which library data was inappropriately accessed. This situation served as an example of how library vendors did not necessarily share that commitment to privacy. Mellifera drew attention to the fact that, in the era of Covid-19, the rapid expansion in telework necessitated by the pandemic resulted in a corresponding growth in organizational data being accessed by personal devices, rendering that data increasingly at risk of being exploited by malicious actors. In this "new normal," it would be even more important that technical services staff take a proactive stance on compliance to avoid being forced to make compromises with sensitive data.

In a series of illustrative slides, Mellifera went over an abbreviated history of United States privacy legislation. Though as of 2020 considered by the Supreme Court to be implicitly guaranteed by the constitution, privacy legislation in the United States remained a patchwork, with differences in application depending on the industry and data type. Conversely, the European Union's General Data Protection Regulation (GDPR), published in 2016, emerged as a more comprehensive law with a wider territorial scope and applicability. This law, though not adopted by the United States, applies to any library that services patrons in the European Union. Even had that not been the case, the ALA steering committee on GDPR compliance recommended the adoption of these more rigorous standards as best practices, as they encouraged good stewardship of data. Mellifera cited Petra Paraschiv's guide to GDPR



compliance for libraries, available at <https://princh.com/gdpr-compliance-for-libraries-5-general-aspects-that-you-need-to-cover/#.YVtOmJrMKUk> , as a useful tool to understanding the principles and enforcement of GDPR compliance.

In her conclusion, Mellifera encouraged technical services librarians to seek out training in risk assessment and to pass this training on by educating our users on ways they can exercise their digital rights. She advised monitoring vendors for compliance, and when possible, drafting legal agreements to limit the ways in which vendors are empowered to interact with patron data. Some vendors had already released GDPR compliance statements, which were useful in determining the company's positions.

#### Q&A

Q: Do Facebook/Google/Twitter have to comply with GDPR?

A: Mellifera confirmed that this is the case, recounting that Mark Zuckerberg had said in 2018 that preparations were underway for the company to be in compliance. However, she also noted that the company had moved their data from Ireland to US as a result of this legislation, presumably to avoid some GDPR compliance expenses. GDPR compliance was very expensive for huge corporations. She additionally wanted to draw attention to the fact that GDPR was beginning to roll out fines for violations, which were being tracked publically online.

Q: How have others worked privacy concerns into licenses for resources? I am particularly concerned with vendors that require users to sign up for accounts to access content.

A: Mellifera opened up the floor for others to respond, in case any participants had experience navigating these types of licenses. There were no comments at the time, but Aimee Plaisance directed users to the event Padlet for further discussion.

### [Trials Versus Access During Unusual Times: Ethical Considerations When Applying Established Collection Development Workflows](#)

[Speaker: James Rhoades \(Old Dominion University\)](#)

#### Speaker bio:

Mr. James G. Rhoades is the Social Sciences Librarian at the Patricia W. and J. Douglas Perry Library at Old Dominion University (ODU), where he has been a faculty member since 2013. He received a Masters of Library and Information Sciences from Florida State University in 2005. He works daily with undergraduates, graduates, and faculty regarding library research, resources, and services. He serves as Chair of the Collection Development Team and the Faculty Senate Library Committee. He has also served as Chair of the Libraries Faculty Assembly and Chair of the Promotion Committee. He serves as the standing ODU representative on Virginia's Academic Library Consortium (VIVA) Collections Committee and the Virginia Tidewater Consortium for Higher Education Collection Development Committee. He serves as the faculty representative on the ODU Board of Visitors Student Enhancement and Engagement Committee. He serves as the Libraries' Federal Depository Library Program (FDLP) coordinator and established the Libraries' Association of Southeastern Research Libraries (ASERL) Centers of Excellence collections. He has presented both regionally and nationally on library instruction, marketing public services, discovery services, collection development, and scenario planning.

## Presentation

Rhoades begin his presentation by recounting a reorganization and revision of collections development duties that occurred at Old Dominion University in 2018. After eliminating a full-time collections development librarian, the responsibilities formerly resting with that position were dispersed across the libraries. In the aftermath of this change, Rhoades became chair of a committee governing collections development, and was tasked with creating formal workflows and documentation to be used to guide collection development activities in the future. During this process, ODU implemented a trial system which governed the selection process for trials of electronic resources. In the end, the group had created 82 pages of documentation that had settled into a consistent workflow.

As the pandemic began, vendors extended free access and extended trials to ODU, as electronic resources became the only viable form of access to materials in many cases. Rhodes found that the uprooted work environment in combination with the sudden influx of temporarily free materials resulted in many ignoring the workflows that had been established by the committee. After the trial period was over, and many of these temporary access agreements ended, the accepted workflows found their way back into use, returning efficiency and organization to the collections development workflow. This situation posed a set of ethical questions to Rhoades, which he invited the conference attendees to consider: is it ethical to set up access to content when you have no means or intention to purchase access thereafter? Is it ethical for the vendor to offer this access when they are aware of that?

## Break

Following this presentation, there was another short break.

## How Much is Too Much? PII and the LC/NACO Authority File

Speaker: Judith P. Cannan (Library of Congress), Paul Frank (Library of Congress)

### Speaker bios:

Judith P. Cannan (Library of Congress),

Judith Cannan joined the Library of Congress staff over 44 years ago and has held several positions at LC. In June 2019, she was appointed chief of the newly formed Policy, Training, and Cooperative Programs Division. The division manages LCSH, LCC, two Library of Congress standards, classification web, Catalogers Desktop, descriptive policy, on-the-job training for staff, Program for Cooperative Cataloging, and BIBFRAME

Paul Frank (Library of Congress)

Paul Frank is the coordinator for the NACO Program, the name authority component of the Program for Cooperative Cataloging (PCC). Paul is also one of the Library of Congress BIBFRAME Pilot trainers and is a liaison to Pilot participants for cataloging and technical aspects of the Pilot.

## Presentation

Paul Frank took the virtual stage and introduced his co-presenter, Judith Cannan, with whom he would be taking turns during the presentation. The presentation would be focused on the purpose of the LC NACO authority file, which both presenters had seen through many iterations and changes over the course of their careers. Under AACRII, the authority record's purpose was to provide the standardized form of a name, an authorized access point, and occasionally, to show the relationship of an entity to a particular bibliographic resource. When the PCC implemented RDA in 2013, the new standard brought

with it many new attributes that one could associate with a name record. This has resulted in much expanded name records containing biographical details that would perhaps be more appropriate to an encyclopedia entry than the NACO authority file. Paul questioned whether this added data was consistent with the stated purposes of the authority record.

Cannan described this as a choice between two different approaches: one that aims for the name record to be as concise as possible while still being distinguishable, and one that includes as much detail as can be readily found. The latter, she felt, had the capacity to do harm, and should be avoided. By including unnecessary details in the NACO record, one might unwittingly include information that could compromise the safety of the individual being described. When adding information, Cannan recommended that the cataloger consider what purpose it serves, and whether or not a user could find the access point without the additional details and expressed disappointment that the ethical consideration of descriptive choices was not more widely taught in library school courses.

Paul, pointing to several specific name entries, illustrated how the standardized form of a name can incorrectly reflect cultural, social, or political beliefs. As an example, he discussed how bias, understandable or not, is implied in the romanization of a non-Latin name into Latin script. Other entries disambiguate through the use of a role or occupation-related term which, as was mentioned in Steven Holloway's presentation, can have the effect of tokenizing the individual to whichever term was chosen. After discussing these examples, Paul invited the audience to consider why so much information is being included if the purpose of authority control, which only requires enough information to distinguish one individual from another, has not changed. Corroborating this point, Paul provided a quick overview of the rules in RDA regarding recording attributes of an agent, observing that the core attributes of an authority record are still, in fact, quite narrow.

Paul and Cannan pointed out that, in addition to the ethical considerations, there are other reasons to avoid adding extraneous information. Cannan observed that the amount of time it takes to research the additional information is not worth it for the purposes of authority identification. Paul observed that more data in the system risks the need for more corrections later. However, the further integration of linked data into library authority work should lessen this burden in the future.

In closing, Paul and Cannan entreated the participants to think before they add extraneous information to authority records, and respect privacy. He noted that there has been an observable increase in individuals contacting NACO to request the removal of information, ranging from a simple removal of dates to the complete eradication of an online identify.

### Breakout Discussion

Following Paul and Cannan's presentation was a second breakout session. Participants were again randomly assigned rooms in which to discuss the day's presentations.

### PTPL Business Meeting

Kim Edwards, outgoing chair, thanked everyone for attending the day's presentations and quickly went over the agenda for the business meeting. She recommended to any attendees unfamiliar with the PTPL business meeting that they stay for the historical moment presentation, and then passed the virtual microphone to Vera Clyburn.

Vera shared her screen with the attendees, displaying the slate of candidates for the board's 2020-2022 term, all running uncontested: Caroline Saccucci for chair elect, Linda Wirth for treasurer (who had served in this position for several years, and had warned the board that this would likely be her last term), Mimi Games for DC representative, Kelly Swickard for Maryland representative, and Andrea Britten for Virginia representative. Vera noted that Kelly and Andrea would be new to the board, while Caroline, Mimi, and Linda had previously served. After the candidates had been introduced, Kim Edwards allowed a moment for floor nominations. When no names were put forth, she provided a link to the voting form in Zoom chat.

Kim next put forth the treasurer's report, explaining that Linda Wirth was not able to attend the meeting, but would be happy to answer any questions about the report. She provided a link to this report in the chat as well.

Next on the agenda was the approval of last year's annual meeting minutes, written by Aimee Plaisance. The minutes had been made available on the website prior to the meeting, and Kim again provided a link to these in the chat. After waiting a moment for any feedback, the minutes were approved.

Rebecca Case then took control of the presentation to report on the year's PTPL scholarship and its recipients. In 2020, PTPL was able to provide two \$2000 scholarships to students currently enrolled in ALA-accredited masters of library science/information science programs. The two winners, Robert Pleshar and Aaron Wilson, highlighted on camera.

Having tabulated the election results, Kim reported that all candidates were elected.

Vera Clyburn presented the 2020 historical moment, a retrospective of PTPL programming and leadership over the last 20 years. Using a visualization tool, Vera pulled keywords from the titles of PTPL annual meetings and workshops, position titles of speakers, meeting locations, and types of libraries to create a series of word cloud images illustrating the evolution of PTPL over the years. Vera also highlighted those individuals who served as chair of PTPL over the 20 year timespan.

After Vera had concluded the historical moment, Kim Edwards, in her last act as chair, thanked the board members for working so hard to plan this meeting under the extraordinary circumstances of 2020. thanks board members for planning this meeting under the circumstances. She then passed the (virtual) gavel to Rebecca Case.

Rebecca, too, thanked the board for their hard work, and gave a special thanks to Kim for succeeding at the unenviable task of being chair during a pandemic. She thanked the attendees and the board one more time and then adjourned the meeting.

## Board Candidate Bios

### Caroline Saccucci

Caroline Saccucci is the Acting Chief of the U.S. Programs, Law, and Literature Division, Acquisitions and Bibliographic Access Directorate, Library of Congress. She is the LC Dewey Program Liaison to the ALCTS/Core Subject Analysis Committee and the LC representative to the Dewey Decimal Classification Editorial Policy Committee. She is a Library-appointed member of the IFLA Standing Committee on Subject Access and Analysis. She has co-written articles published by Cataloging and Classification

Quarterly and Library Resources & Technical Services. She has a B.A. in history from Longwood University and an MLS from Simmons College.

#### Linda Wirth

Linda Wirth is a retired librarian with a varied career. Her first position was in reference in a public library. Her second position was her first major change, working in the library of the office of the Ohio State Attorney General. With her 3rd position as a law cataloger for the University of Akron Law Library, she began a career as a cataloger and has been a one ever since. In her cataloging career she has worked in a variety of organizations: academic, the Urban Institute, private law firms, and Washington National Cathedral. In these positions she has cataloged legal materials, economic materials on microfiche/film, Slavic language periodicals, and electronic journals. She retired from George Washington University in 2005. She is a long-time member of Potomac Technical Processing Librarians.

#### Mimi Games

Mimi Games has been on the Board of PTPL since 2010 and was a 2009 scholarship recipient. She has acted as the Cataloging and Metadata Coordinator at the Pence Law Library of the Washington College of Law for nearly 15 years. Her primary duties include cataloging monographs and serials in various formats; assisting in maintaining consistency, integrity and accessibility of the data in Pence's ILS (ALMA); determining and documenting changing workflows; assessing and resolving problems regarding the ease of accessibility to e-resources. Mimi speaks fluent Italian and is conversant in ASL.

#### Kelly Swickard

Kelly Swickard is a cataloging and metadata librarian who has over ten years' experience working in academic librarianship. Currently, Swickard works as the Metadata and Linked Data Strategist at Project MUSE. Her interactions with library users and researchers has driven her to focus on findability and accessibility of resources through clear and organized data. Swickard hopes that linked data can formulate an increased global data program and standardization. Using and transforming metadata into functional discovery process is one of her primary goals. Other goals are to create more inclusive metadata and to strive for greater ethical cataloging standards.

#### Andrea Britten

Andrea Britten is currently working at Marymount University in the Resources and Systems Department, and has worked in the Access Services Department there as well. Her library experience was rounded out with a six-month stint at the National Gallery's Research Library in its Technical Services Department. She is a relative newcomer to the professional library world earning her MLIS in 2017, after a long break from working in the IT corporate world. She hopes to further the vision of PTPL and continue its agenda of professional development and networking opportunities in processing and technical librarianship.

#### Scholarship Recipient Bios

##### Robert Pleshar

Rob Pleshar has been the Library Associate for Electronic Resources at Towson University Library since January 2019. Prior to this, he was at University of Chicago Library, where he worked for 23 years. Starting in 1995 as Head of Serial Orders and becoming the Electronic Resource Specialist in 1999. He

started his library career at Carnegie Mellon University's Engineering and Science Library while a student there and continued as their Computer Science Library Assistant for 5 years. He has worked on the development teams for Ole, GoKB and Folio while at University of Chicago. Rob is currently interested in the issues of accessibility for electronic resources, assessment of their use and value and improving user experience. He also plays the tuba in a number of musical groups.

#### Aaron Wilson

Aaron Wilson is currently a Database Editor and Copy Cataloger at the University of Maryland. He was previously a Library Associate at George Mason University and has held Library positions at Zimmerman and Associates, Howard University and Bowie State University. Aaron has a BA in History and American Studies from Washington Adventist University. He is a member of ALA, ALCTS, Black Caucus of ALA and Association of College and Research Libraries.