Introduction

These guidelines were written in 2020 by Charlotte Lellman, Processing Archivist, with input and collaborative support from Hanna Clutterbuck-Cook, Processing Assistant; Amber LaFountain, Metadata Archivist; and Jessica Sedgwick, Collections Services Archivist. We are a group of white, cisgendered women, comprising a combination of straight and queer identities, and working at a predominately white, private institution. In the course of developing these guidelines we have sought out, learned from, and referenced work on inclusive, respectful, and reparative description by colleagues of many different identities from a variety of institutions. We thank our archival colleagues who have been doing this work for a long time and whose work has given us an opportunity to learn. The guidelines are accompanied by citations that point to an annotated list of Works Cited and Additional Resources. They are also grounded in and directly support the missions and values of our local Longwood community (see the Community Mission & Values section for details).

This is a living document that we will update to reflect increasing awareness about how to describe our collections with greater conscientiousness for greater inclusivity.

Social contexts, individual and institutional biases, and structures of power influence how records are created, maintained, represented, and interpreted. Archival description plays a role in the representation of records – it shapes whether and how collections are discovered, navigated, and understood. Archivists decide, for example, which names and subjects will be included or omitted in description, and what language is used to represent and contextualize these subjects.

These guidelines are intended to support archivists in proactively creating description that is respectful, just, and clear. Archivists should strive to create description that prevents or minimizes unnecessary harm, recognizing that Center collections reflect biomedical and public health work which itself can embody many forms of harm and human suffering.

Archivists are encouraged to approach processing and description work with an equity mindset, considering the following guiding questions:

- What role can your words have in either perpetuating or combating marginalization and archival erasure?
- Who is harmed and who benefits from your description?
- In the interest of clarity and equity, what should be brought to the forefront to appropriately contextualize the records?
- What you might be leaving out (Winston)?
- How have colonialism, racism, sexism, or other forms of hegemony impacted the origins of the records you are describing (Drake)?

Guidelines

Identity & Naming

When describing a creator or subject who is part of an underrepresented or marginalized minority based on race, gender, sexual orientation, citizenship, disability or other identity, it is usually best to use person-first language (A4BLIP, Rinn).

Examples:

After working as Staff Psychiatrist at the Massachusetts Institute of Technology (1968-1972), she was appointed the Dean for Student Affairs (1972-1978), the first woman to hold this position. (Carola Eisenberg papers, processed by Valerie Enriquez)

As an undergraduate at the University of Minnesota he suffered from a polio-like illness that required the use a wheelchair. (Robert A. Good papers, processed by Bryan Sutherland and Christina M. Thompson)

When a person is publicly recognized by their race, gender, sexual orientation, or other identity marker, it is appropriate to describe them that way in the finding aid. Whenever possible, use the terms preferred by that person (A4BLIP). If you are not sure about an individual’s preference, use the most common relevant preferred terms. Do some research before you begin, especially if you do not share the identity of the person who you are describing (Rinn, Tang).

Example:

She researched the involvement of medical professionals and pharmaceutical officials and regulators; as well as the lives of thalidomide victims, who later came to refer to themselves as “thalidomiders.” (Elinor Kamath papers, processed by Charlotte Lellman)
It may be appropriate to ask relevant communities about preferred language for identities or terms that are unfamiliar to you (PNAAM). Be sure to do this gently, with an awareness that the community may have been mistreated by people from powerful institutions, and that it is not their responsibility to help you (Baucom, PNAAM). Consider the importance of earning trust over time (A4BLIP, PNAAM).

Do not use titles like Mr./Mrs./Ms./Mx., unless it would clarify the identity of someone whose first name is unknown. To differentiate between people who have the same last name as the primary subject of the finding aid, use the additional subjects’ first and last names. If the finding aid describes co-creators with the same last name, or equally describes two people with the same last name, use both people’s full name.

Examples:

Additional subjects with same last name:

Co-creators: Together, Robert H. and Suzanne W. Fletcher served as co-directors of the International Clinical Epidemiology Network (INCLEN) training center from 1986 to 1990 at the UNC School of Medicine. The Fletchers co-founded and led the CRN Scholars Program from 2007 to 2012. Suzanne Fletcher’s research focused on breast cancer screening and prevention as well as clinical epidemiology; Robert Fletcher’s research focused on colon cancer prevention, clinical epidemiology, and the effectiveness of peer review in academic journals. (Robert H. and Suzanne W. Fletcher papers, unprocessed)

Follow the guidance below for using identity terms in narrative description fields and subject headings:

Narrative description fields.

If you describe a person’s identity using a term that may not be generally preferred by members of that identity group today, provide an explanatory note to document your efforts (Rinn) or to clarify your reason for using that term. Avoid imprecise, anachronistic, or outdated terminology, paying particular attention to identity and medical terms (A4BLIP, Bolding). If your scope and content note, biographical note, or administrative history employ outdated, pejorative, or offensive terms that are taken directly from the records, include the current equivalent term(s) in parentheses.

Subject headings.

Given the limitations of Library of Congress Subject Headings, it may be preferable to prioritize broad subject access over precise identity or medical terminology when assigning subject headings (A4BLIP, Berry, Bolding, Bolding2, Rinn, Robinson-Sweet). If a relevant subject heading is harmful or pejorative, consider using a locally-devised heading instead (Boyd). Explain your choice in an explanatory processing note.

Provide context (in the form of a processing note) for any outdated or non-preferred terms used in description or as subject headings (A4BLIP). The sample statement below may be used and/or modified as appropriate:

Recognizing that historical medical terms do not always completely or directly map to contemporary terms, that historical terms can be offensive or inaccurately characterize a condition, and that the presence of both historical and contemporary terms may be useful for researcher discovery, the archivist has attempted to employ historical terms as they appear in the context of the collection in the description below, along with contemporary terms in parentheses.

Examples:

His areas of research included shell shock, dementia praecox (schizophrenia), and the pathologic sources of mental illness. (E. E. Southard papers, processed by Hanna Clutterbuck-Cook)

Benda’s research interests included mongolism (Down syndrome) and cretinism (congenital hypothyroidism), mental retardation (intellectual disabilities), neuropathology, and existential psychology and psychiatry. (Clemens Benda papers, legacy finding aid conversion, processor unknown) (Note: Edited from original)

Avoid language that tacitly devalues non-Western traditions, values, or practices (Drake).

Recognition, Language, & Power

Avoid venerating creators or using superlative language, especially based on family relationships or reputation (A4BLIP, Drake, Bolding3). Recognize that neutrality in archival description is an unhelpful myth; at the same time, strive to avoid value judgments and leave interpretation to the researcher (A4BLIP, Berry, Robinson-Sweet, and others). This does not mean you cannot convey the impact of someone’s work – this can be important for contextualizing the records - but this should be done with a “show, don’t tell” approach; in other words, you should illustrate that impact by describing the work and the results of the work. You may also consider quoting from or citing biographical sources to convey impact or significance (example: “...often referred to as the ‘godmother of neonatology’ [citation]”), or rely on listing honors or awards received as a way to demonstrate recognition.

Examples:

The discovery of TAF/VEGF led to numerous new medical treatments for a variety of illnesses. Folkman’s laboratory developed angiostatin and endostatin, two antiangiogenic factors that were used in cancer clinical trials. Folkman’s antiangiogenesis research also laid the groundwork for new treatments for macular degeneration and for colorectal, brain, and breast cancer (M. Judah Folkman papers, processed by Meghan Bannon Kerr)
Finland's scientific contributions included original work on the serum treatment of pneumococcal pneumonia; treatment of respiratory injuries caused by noxious gases and/or bacteria; clinical evaluations of major antibiotics such as sulfadiazine, erythromycin, tetracycline, and the myriad of semisynthetic penicillins; and exhaustive studies on how bacteria evolve resistance to antibiotics. (Maxwell Finland papers, processed by Alyson Reichgott, with advice and comments by Dr. Jerome O. Klein)

Throughout her career, Avery studied lung biochemistry, surface tension, and pulmonary physiology. She is known for her discovery of pulmonary surfactant while a research fellow at Harvard Medical School. She has been awarded numerous honors, including the National Medal of Science in 1991. (Mary Ellen Avery papers, processed by Meghan Bannon and Jessica Sedgwick)

Counterexamples:
A man with a mission for using his considerable wealth and intellectual expertise for the good of mankind, Gamble devoted his life to "The Great Cause"—his goal of making each and every child birth the result of a conscious decision on the part of responsible parents. (Clarence Gamble papers, legacy finding aid conversion, processor unknown)

He attracted a top flight staff of men and women whose research he directed and careers he influenced. His prodigious contributions to scientific and clinical aspects of neurology and psychiatry were summarized in his monographs, The Borderlands of Psychiatry and The Foundations of Neuropsychiatry. (Stanley Cobb papers, processed in 1992, processor unknown)

Some of the most interesting items are fragments of handwritten notes scribbled on the backs of programs, folders, and correspondence. (Jacob Moreno papers, finding aid authored by Christopher Kraus and Joni Clouse)

Describe the subjects of the records as well as the creators (A4BLIP, Drake).

Example:
During the 1960s, Mayer was involved with several citizens' groups working against hunger in the United States, including the Citizens' Board of Inquiry into Hunger and Malnutrition in the United States, which published the controversial Hunger U.S.A. report in 1968. (Jean Mayer papers, processed by Hanna Clutterbuck-Cook)

Describe “hidden” creators (A4BLIP), such as spouses, secretaries, or students.

Examples:

Himes (with the help of his first wife, Vera) carried on an extensive correspondence [...] (Norman E. Himes papers, legacy finding aid conversion, processor unknown) (Note: Edited from original).

The record of the last 25 years of the life of Jacob Levy Moreno reveals an interwoven professional and personal venture shared by his wife and collaborator, Zerka Toeman Moreno. Since Zerka Moreno frequently acted or wrote in behalf of her husband, no attempt has been made either to differentiate her files or to include her name in the index, other than in obvious instances or for personal materials. This policy has been extended to others who acted and wrote in behalf of Dr. Moreno and his enterprise (albeit on a lesser scale)—for example, Ann Manzoelloto any of the other secretaries at Beacon—especially when dealing with routine administrative matters. (Jacob Moreno papers, finding aid authored by Christopher Kraus and Joni Clouse) (Note: Edited from original).

Pertinent information about the creator may include information that does not reflect positively on the person (Robinson-Sweet). Whenever possible, cite the source(s) of the information or point to the records that underpin the statement. State this information clearly.

Example:
In 1906, Strong was involved in the infection of twenty-three prisoners at Bilibid Prison in Manila, Philippines, with the plague virus. Thirteen of the men died; the rest recovered. After some investigation, the infections were blamed on a laboratory mix-up and Strong was unofficially exonerated. (Richard P. Strong papers, processed by Hanna Clutterbuck-Cook)

Avoid employing the passive voice to shy away from assigning agency (A4BLIP).

Example from A4BLIP:

For example, consider the difference between these two sentences:

1) “Four Kent State University students were killed on May 4, 1970, during a clash between the Ohio National Guard and a crowd gathered to protest the Vietnam War.”

2) “Members of the Ohio National Guard killed four Kent State University students during a mass protest against the Vietnam War.”

Use language that neither glorifies a dominant group nor hides or misrepresents members of a marginalized group (A4BLIP)
If you are unsure of something, use qualifying language. Be clear about the uncertainty, rather than hiding it (Bolding). Avoid interpretation and speculation that is not clearly grounded in the records.

Example:

Spalding’s mostly undated lecture notes cover anatomy and surgery, and may have been delivered while he was a professor at Fairfield Medical College. (Lyman Spalding papers, H MS c2, processed by Brooke McManus)

Anatomical, medical, scientific, and geographic terms often have a colonial legacy. Include common names or explanations alongside medical or scientific terms (Berry2, Jones). Consider the cultural and historical context of the records you are describing, and include Indigenous or non-Western terms or place names, whenever relevant to the context or cultural understanding of the subjects or circumstances you are describing (Bolding3, Jones).

Audience & Accessibility

Describe collections using language that is accessible to a wide variety of potential users. Consider those outside of the medical or academic communities and those who are novice archives users (A4BLIP).

Example:

Hasan’s research focuses on the application of photodynamic therapy (also called photomedicine or photochemotherapy) for the diagnosis and treatment of disease. Photodynamic therapy is based on photochemical principles and requires a photosensitizer or light-activated chemical compound, light of the appropriate wavelength to activate the photosensitizer, and the presence of molecular oxygen. Photodynamic therapy works either by directly destroying malignant cells or by prompting the natural cycle of cell death (apoptosis). (Tayyaba Hasan papers, processed by Hanna Clutterbuck-Cook)

Use clear and direct language. Whenever possible, avoid complicated phrases and jargon, and long sentences and paragraphs. Use common language to clarify terminology that might be inaccessible.

Example:

The collection contains professional and personal correspondence […] chronicling his research on insulin therapy and chemical disorders, including lysergic acid diethylamide commonly known as LSD. (Max Rinkel papers, processor unknown)

Use simple and straightforward formatting. Use a bulleted list in cases where it would be easier to read and understand than a block of text.

Challenging Content

Archival collections may contain content that is emotionally challenging; for the purpose of these guidelines we consider “challenging” to mean offensive, disturbing, or traumatizing in our contemporary context. Whether or not an individual experiences a particular item or set of materials as challenging is personal and not always predictable. Whenever you feel the contents may merit it, supply a content note at the appropriate level with a clear and straightforward description of the challenging material. The purpose of this note is to give the researcher the opportunity to decide whether they really want or need to view these materials, or at least, to mentally or emotionally prepare themselves to view the materials.

Examples:

Please note: this series includes graphic images of Holocaust and possibly Dutch Famine survivors and victims, as well as graphic animal research images. The presence of these images is noted with each folder in the list below. (Fredrick J. Stare papers, processed by Amber LaFountain)

File contains postmortem photographs of individuals who died by suicide, apparently collected by Stearns for research. (Albert Warren Stearns papers, processed by Bryan Sutherland)

References

Community Mission & Values

The Description Policy is informed by and directly supports the missions and values of our local Longwood Community. In particular it supports the following elements:

- Diversity & Respect
- Integrity & Accountability


- We acknowledge the strengths and weaknesses of our history and actively promote social justice, challenge discrimination, and address disparities and inequities.


- That compassion, fairness, and trust are fundamental values that enable our individual and collective well-being


- Create and sustain a vibrant and inclusive intellectual community with an environment that fosters the acquisition of knowledge and skills about diversity, equity, cultural competence, and advocacy to improve public health locally, nationally, and globally
- Create and advance knowledge and its translation into discoveries that lead to actions that improve health of people and populations

Works Cited


This a collaboratively-produced guide for Anti-Racist Description, with an extensive annotated bibliography. Cited above as “A4BLIP.”

- Avoid trying to be “neutral;” use accurate language, even when unpleasant/uncomfortable
- Avoid passive voice
- Re identities: focus on the person first
- Do not valorize white male creators
- Think about broad audience—use accessible language
- Use preferred terminology; if you use other terminology, explain your choices (LCSH-use alternate)
- Audit old finding aids


This is an academic article about LGBTQ identity terminology, especially in subject headings. Cited above as “Baucom.”

- Insufficient LCSH vocabulary for LGBTQ identity terms that are common-language and non-stigmatizing
- Issues at stake: discoverability, misidentification
- Recommends 1) collaboration with local LGBTQ community, community archives, or donor, 2) go beyond LCSH, 3) use “original, historically accurate terminology if known,” 4) provide opportunity for researchers to provide corrections


This is a pdf of slides from a Society of American Archivists 2019 presentation by Berry, Bolding, Tang, Winston. Cited as “Bolding” and “Tang.” See subdivision of slides in the pdf. Also, see Edwards below.

- Bolding: Avoid anachronisms; know how terms (identities) change over time
- Bolding: “Contextualize historically accurate terms that are now offensive”
- Bolding: “Use terminology employed by the creator during their lifetime”
- Bolding: “Provide feedback mechanisms”
- Bolding: “Be clear about what we (don’t) know”
- Tang: Culturally aware questions to ask prior to (re)description, based on:

1. Where did I get the information? (Wisser)
   - Would donors, sellers, custodians, creators, subjects, or users agree with the source(s)? How does my cultural identity affect the description? (Tang)

2. What system am I using? (Wisser)
   - Does it reinforce white, male supremacy? (Tang)

3. Who are my users? (Wisser)
   - Who are my creators and subjects, and have they been marginalized/maligned in the historic record? (Tang)

4. What format-specific details are there? (Wisser)
   - Would my users, creators, or subjects agree with the chosen format details? The styling? (Tang)

5. Does my description “accurately, appropriately, and respectfully” (Farnel, et al., “Decolonizing Description”) represent marginalized and underrepresented persons? (Tang)

Some of Tang’s recommendations for small-scale remediation
- On-demand or as-you-go remediation.
- Ask reading room users to assess finding aids, guides, or catalog records as they work.
- Don’t automatically ask your token [blank] coworker.
- Discuss/train colleagues in cultural literacy.
- Do your due diligence. Research!


This was a presentation about Boyd’s work with disability activism collections at University of Massachusetts, Amherst. Cited as “Boyd.”

- Conservative creator-focused approach to privacy for disability rights collections:
  - Was this intended to be public or not? Was creator public about their disability?
- Reached out to living 3rd parties for permission to digitize
- Takedown policy
- Metadata:
  - People-first language (refer to person first, disability second)
    - Ex. “person with disabilities,” not “disabled person”
    - Ex. “uses a wheelchair,” not “wheelchair-bound”
  - Preferred terminologies for some individuals
    - Deaf vs. deaf
      - Deaf refers to a community of people that use ASL.
      - deaf is common term, not just those who use ASL.
  - Outdated or offensive terms: use modern terms except in organizations’ names
  - Local headings where LCSH isn’t sufficient
  - Will sometimes use an outdated LCSH term if a modern term is unavailable. But not if the outdated LCSH term is offensive—will use local term instead.
  - Know that different members of a group may prefer different terms.


This is an article critiquing the archival principle of provenance. Cited as “Drake.”

- Critique of provenance (exclusionary, patriarchal, colonial concept based on ownership and creatorship):
  - “To the disenfranchised, marginalized, and colonized, what is the idea of provenance? For one who legally cannot own her body, what does it mean to own records?”
  - For biographical notes: “In this note, archivists often write massive memorials and monuments to wealthy, white, cisgendered and heterosexual men, including selective details about the creator that have minimal bearing on the records, and instead serve to valorize and venerate white western masculinity.”
References:


This is a blog post recapping a Society of American Archivists 2018 presentation by Berry, Bolding, Tang, and Winston. Cited as “Winston,” “Berry,” and “Bolding2.” See also Bolding et al. above.

- Winston: what are we not describing? Ex: not describing offensive racial images as such, not describing labor by POC in a photo from Panama Canal
- Berry: Context for historically accurate racial descriptors; “The assumption of neutrality creates biases in favor of historical racism, and that the archival profession is still overwhelmingly white women — all of which contribute to problematic descriptions” (Peralta, summarizing Berry); issues with mass description
- Bolding: for historical LGBTQ-related material, “Research terminology use in its original historical context and provide context for historically accurate terms if used in description. Use descriptive notes in finding aids to describe activities instead of naming identities where they are ambiguous, taking a note from queer signaling whereby one leaves clues without outing subjects.”


This is a blog post recapping a panel discussion with Bolding and others. Cited as “Bolding3.”

- Mostly focused on collecting, reaching new audiences
- Kelly Bolding: encourages reviewing old finding aids and revising them; encourages adding racial descriptors for white people; encourages using Indigenous place names; encourages removing valorizing language for white creators; don't hide subjects of color
- “If, as Bolding said, “by singing the praises of white men, we justify why our collections are full of them,” we must examine and counteract the ways in which archival institutions promote white supremacy” (Hixon).


This is a website with a list of guiding principles pertaining to handling Native American archival materials. Cited as “PNAAM.”

- Work with communities re archival holdings related to Native Americans
- Work with communities re terminology, LCSH, etc.
- Explain any derogatory terms that are used
- Be open to non-Western ideas about access, use, and ownership


This is an academic article about nineteenth-century disability terminology in archival description. Cited as “Rinn.”

- Use subject headings (as well as scope and content, biographical note) to describe people with disabilities in complex ways (medical, social, personal)
- Custom subject headings are a possibility
- “Reflect the preference of living communities”
- People-first language (when preferred)
- Provide historical context
- Include notes re terminology choice—makes clear that “due diligence” was involved and “awareness that for some the final standards may not be ideal”


This was a presentation based on Robinson-Sweet's article “Truth and Reconciliation: Archivists as Reparations Activists.” Cited as “Robinson-Sweet.” See “Robinson-Sweet” below.

- Archivists as “recordmakers,” not neutral caretakers; archivists provide context
- Archives important evidence in truth and reconciliation commissions in Chile, Germany, South Africa, etc.
- “Archives of oppression”
- Is our repository profiting from licensing/reproducing materials held without permission? Medical specimens? (For example, the Renty and Delia images at the Peabody Museum)
- Appraisal

Privileges creator; is there evidentiary value to original order?

Need to center evidence of racism, slavery, etc.

Who benefits from access?

Consider trauma, Indigenous practices/uses, etc. See Protocols for Native American Archival Materials, Accessibility and Use: http://www2.nau.edu/libnap-p/protocols.html#Accessibility.

Community archives; precariousness of archives

Destroying records destroys opportunities for justice

Name perpetrators—what if KKK rolls were digitized and searchable like census records on Family Search or Ancestry.com?

Scientific names are inherently colonial

She was “shocked at how little [the collection] has essentially no indigenous nomenclature in any of their database of all the plants”. She then brought up a valid point that “the whole concept of an herbarium is inherently colonial because it essentially it stems from explorers… naming ["discoveries"] after the explorers themselves… even though oftentimes discovery was only done that with the help of Native folks” (blogger, quoting Julie Jones).

“Dorothy Berry added on "whose scientific names?" Let’s keep asking ourselves that as we start sifting through collections.”

This is a blog post recapping an online Society of American Archivists panel, which included Berry. Cited as “Berry2” and “Jones.”

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Additional Resources


This is an academic article about disability theory and terminology as applied to archival description.

Promotes anti-hierarchical approach, multiple perspectives

“Archival assemblages”


This is an academic paper about cultural competency in archives.

Re Dominique Luster’s work with the Teenie Harris Archive at the Carnegie Museum of Art (quoting Luster, then the Teenie Harris Archive):

“This work is, in part, an effort to "elevate humanity back into our archival records through description." Furthermore, the management of the whole project surrounding the Teenie Harris photograph collection "was shaped by an advisory committee . . .who insisted on the African American community's ownership of the history represented in Harris images. Consequently, the archive catalog is based on first-person accounts by Harris's subjects and contemporaries…" […] Luster's work acknowledges the power and control inherent in archival description and provides an almost arithmetic formula for description including elements of cultural competence attitudes: kind, compassionate, mindful, empowering, respectful, and inclusive description = “conscious.”"


An article outlining the Southern Historical Collection's approach to remediation of white supremacist legacy description.


This is a digital archive at the College of the Holy Cross, Worcester, Massachusetts, with webpages describing their practices for describing race, gender, and sexuality terms.

Describing Objects: "The creation of metadata requires interpretation and labeling and it can be a highly subjective and political act. Whenever possible, we adopt language that is already provided in an object. For non-textual objects such as photographs, we do not attempt to over-interpret visual cues related to individuals’ identities (such as race, ethnicity, ability, etc.) given the likelihood of misinterpretation. Researchers should note that this practice causes some themes to be less apparent in search results.”

Has link for contact re updates/mistakes

Has guide for searching for races and ethnicities
• Explanation of their decisions re terminology


This is a blog post about an academic project focused on analysis of LGBT descriptive terms.

† “Identify instances of outdated and harmful language and create solutions within these existing systems of encoding data.”
† “While data structure and replicability are important, how do you balance the need for homogeneity with the potential for inclusive, even recuperative, description?”


This is an academic article about the role of archives and archivists in reparations (in a broad sense).


In this talk Westbrooks described UNC’s Conscious Editing Initiative and advocated for libraries to reckon with the various systems in place within libraries and institutions that perpetuate racism and inequity.


This is an academic article about disability theory as applied to archival description.

• Complex embodiment lens
• “Do archives currently house disability collections that are not described? Are these collections undocumented because the archivists who processed them understood disability as a medical problem and not an identity or experience?”

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