

Just Description

Preparing the ground for an international movement to radically reimagine descriptive workflows that promote equitable and inclusive practices and representation in central information systems.



A Shift Collective Report for OCLC
August 2021



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1.

Introduction

When we originally sat down with OCLC to conceptualize this project, we were excited about the possibilities and the interest they expressed, individually and as an organization, in tackling serious systemic problems at the foundation of library sciences.

Our hope is that work like this is evidence of cultural memory institutions taking some of the necessary first steps toward facing the truth about the ongoing impact of genocide, slavery, colonialism, and white supremacy that are still largely unacknowledged, underdocumented, and undertaught. In order to come together to truly reconcile and heal, we must first examine and acknowledge how systems have been created and perpetuated to privilege a few at the expense of many, find the strength and perhaps the freedom to apologize to those who have been harmed, and to begin to atone and make whole through the redistribution of resources and power.

While there is great support for such initiatives in cultural and educational institutions, in the cubicles and boardrooms of the companies managing knowledge and information systems, and in the philanthropies supporting them, these titanic organizations are by nature, and by design, slow to change. We applaud the incredibly hard work that is happening within to quicken this change. We hope this meeting of change makers, gatekeepers, designers, administrators, teachers, students, freedom fighters, catalogers, facilitators and others, has been a moment to further speed the process.

Indeed, we found that radical change is afoot, that there is evidence

already of radical reimagining, that prototypes are beginning to scale, networks beginning to emerge.

This report provides a snapshot of a moment in time, and points towards a possible collaborative future that can help us rebuild the foundations of knowledge systems in inclusive and equitable ways. In the Evaluation Findings and Recommendations, we highlight what we heard from participants about how OCLC and other centers of power within the library and cultural heritage sector can move toward change. In the Activity Outputs, we look closely at five design challenges in the space, and how these specific design opportunities and network strengthening can be immediately bolstered and built upon with further financial investment.

We have also shared the process and methodology we followed in this convening, and some of the things we learned along the way as we pursued this often difficult, and deeply rewarding work.

We are grateful to have had the opportunity to work with the outstanding team at OCLC, especially Chela Weber, Mercy Procaccini and Merrilee Proffitt, who joined our convening team as facilitators and analysts. Thanks also to the leadership of the outside advisory panel that contributed their expertise and vision, and all of the participants around the world who gave so generously of their time and enthusiasm to trust in a truly unique convening in the middle of a global pandemic.

We also want to thank Rachel Frick in particular for her vision, and for believing that such a convening could happen at all. Her trust in our process and her work toward meaningful change made this possible.

Last but not least, I also want to thank the Shift Collective team that assembled for this project: Asante Salaam, Bergis Jules, Gerry Himmelreich, Jennifer Himmelreich, Lynette Johnson, and Tayo Medupin. You are all a continual inspiration to work with.

Jon Voss
Shift Collective
August 2021

2.

Project overview

Project description

With support from The Andrew W. Mellon Foundation, the Reimagine Descriptive Workflows project seeks to unpack and address harmful practices by convening a diverse group of experts, practitioners, and community members to determine ways of improving descriptive practices, tools, infrastructure, and workflows in libraries and archives. This collective, community-centered effort explores opportunities for reforming our systems and ways to chart a path toward implementation of antiracist and inclusive language in metadata descriptions at scale and at a community level.

Background

Shift Collective worked with OCLC to draft a grant proposal that would provide funding to convene (and compensate) a diverse group of experts, practitioners, and community members to explore the opportunities and challenges of implementing antiracist and inclusive language in metadata descriptions. The convening sought to bring together a wide range of domain expertise — being very careful to draw from small organizations as well as large — and especially those from previously excluded and marginalized communities.

Objectives

As described in OCLC's grant proposal to the Mellon Foundation: Convene a conversation of community stakeholders about how to address the systemic issues of bias and racial equity within our current collection description infrastructure.

- **Share with member libraries** the need to build more inclusive and equitable library collections and to

provide description approaches that promote effective representation and discovery of previously neglected or mis-characterized peoples, events, and experiences.

- **Develop a community agenda** that will be of great value in clarifying issues for those who do knowledge work in libraries, archives, and museums, identifying priority areas for attention from these institutions, and providing valuable guidance for those national agencies and suppliers.

Based on work with an advisory panel of domain experts and practitioners who advised on the convening format, goals for the convening were modified and stated this way:

- **Create a safe space** to share and connect honestly as humans.
- **Lay the foundations** for relationship building and repair.
- Build a basis for reciprocal relationships between communities and centers of power.
- **Inspire radical thinking** to rebuild a more just metadata infrastructure.
- **Build a concrete roadmap** for change in the sector and keep conversation going.

3.

Evaluation findings and recommendations

An appetite for major change

At least among practitioners, there is an appetite for major change in this field. When asked why people were interested in attending, four primary themes emerged in their narrative answers:

- Desire for developing concrete approaches.
- To connect with others doing similar work.
- Acknowledgment of need to change the current system.
- Want to engage in collaborative problem solving.

In framing the convening as setting a foundation for a community of practice, 83% of respondents expressed a desire to learn concrete approaches, frameworks, models and/or workflows that can contribute to change.

When asked prior to the convening what they plan to contribute to this community of practice, 43% of respondents were interested in sharing personal or community experiences, 15% were interested in sharing institutional experiences, 37% did not address what they have to offer, less than .5% specifically indicated using their position of power to institute change.

Within the convening, participants often leaned toward the possibility of identifying and creating entirely new systems to address inequity and white supremacy in descriptive practices, rather than retrofitting existing systems. There exists an opportunity in future work in this space to dig deeper into an exploration of alternative methods that are being employed at least on a local level internationally and show promise of scale.

It is interesting to note that just over a third of participants in pre-convening applications did not address what they have to offer, but did indicate what they hoped to receive from

the convening. This reflects an extractive approach, an approach that continues to uphold and support the existing harmful systems.

One recommendation for shifting extractive approaches is to intentionally value the communities who are being asked to do the work. While this includes funding that is reflective of the value of intellectual property, it also involves a more radical shift away from cursory community engagement and into the realm of community co-creation that could use design methodologies.

SELECT PARTICIPANT QUOTES

“We encouraged people to get beyond thinking about fixing vocabularies!”

...

“I wish OCLC would be more intentional about divesting from LCSH for problematic headings.”

“I would have loved more conversation about how individual institutions have been collaborating with communities and whether there is a feasible way to connect those collaborations between institutions for a larger network. Much of this discussion was left in the abstract.”

“Recognition of the problematic issues with copy cataloging, and how not only marginalized communities are impacted, but also how there are larger systemic issues facing cultural heritage institutions engaged in this work. I’m not sure what this looks like, but this may mean a radical restructuring of OCLC services or other commitments to demonstrate good will.”

Identifying need for a safe and collaborative space

Creating a safe space to share and connect honestly as humans is integral to laying the foundations for relationship building and repair. Essential to this is the need to ensure that these relationships are reciprocal between communities and the centers of power. When relationships are reciprocal, parties feel valued and honest conversations can occur.

Of the 26 respondents to the post-convening survey, all agreed or strongly agreed that the convening created a safe, engaging space to support honest and inspiring conversations, with 88% strongly agreeing to that statement.

In response to whether the convening established the foundation of trust for community engagement and reciprocal consultation in the space of just metadata description, 92% agreed or strongly agreed, with only two neutral responses.

Convening participants are eager to see a concrete roadmap for change in the sector and a commitment on OCLC's part to take action. BIPOC communities often approach the work differently. Instead of asking 'what can I do to help,' people from these communities show up and say, 'here's what I have to give.' In order to continue inspiring radical rethinking to rebuild a more just metadata infrastructure, these conversations need to continue.

While additional convenings are discussed in another key finding below, another suggestion for continued work includes a web-based location where conversations can be ongoing, offering support to one another as "we embark on these journeys." OCLC has already opened a Slack channel for convening participants and this could be an avenue for organic network seeding and growth, though stewardship will be necessary to truly grow this network.

"I think at some times, the 'newness' of this particular convening led to a sort of rigidity. Important discussions between practitioners were sometimes put aside or cut short in favor of returning to a set agenda. While this is perfectly understandable, especially when considering time

constraints, it can also inhibit the ability of collaborators to fully engage with each other in meaningful ways."

...

"We could have built in time and ways for people to connect one on one with others. Randomized matchmaker style."

"I would've liked an opportunity for an indigenous only space. There are knowledge systems and metadata discussions unique to colonialism."

Acknowledgment of harm

Acknowledgment was one hope/expectation voiced during advisory group discussions, in small groups during the convening, and afterwards through the post-convening survey. In response to whether the convening began to address the systemic issues of bias and racial equity within our current collection description infrastructure, 50% strongly agreed and 38% agreed, with only three responses as neutral.

As a product of action, public expression of knowing requires demonstration of change for the betterment of the library community. While OCLC did put out a statement describing the purpose of and reasons for this project, a more strongly worded and publicly amplified statement of its historical role and contemporary perpetuation of the harm it has done, is needed. Consider as a possible framework the three primary actions of the process of racial truth and reconciliation practiced in places like South Africa, New Zealand, and Canada,¹ in their national libraries and museums, and in organizations worldwide: acknowledgment, apology, and atonement. This acknowledgment of active

participation and complicity in a racist system is a first step toward healing and reparation.

Doing the research within OCLC to understand this past harm and mapping actions to move forward is a recommended next step for the organization. There have been many instances of injustice in world history that have prompted people and organizations to take action toward systemic change. Perhaps most recently, the George Floyd murder in 2020 in the United States prompted OCLC, many universities, non-profits, and corporations to issue statements, and a year later we can now measure different ways these statements have been backed (or not) with meaningful action. We recommend committing internal resources and bringing in external expertise when necessary to assess and determine a path toward measurable change; create public action plans and timelines; and examine the sources of inequity in the structures of library and information sciences and OCLC's historic role in supporting them, so that they can be specifically addressed.

“Freely acknowledge that [OCLC] play a role and externalize plans for improvements (and benchmarks for reaching goals, even if they miss the benchmarks).”

¹ For just one example, see *What Canada Can Teach America about Racial Reconciliation*, accessed August 25, 2021 at <https://wearenotdivided.reasonstobecheerful.world/canada-truth-reconciliation-lessons-for-america/>



Building trust

In addition to creating a safe space, trust is also necessary for shifting away from extractive approaches towards stewarding change. Respondents were asked the open ended question: what essential characteristics of establishing trust in professional collaborations or making space for this work could have been emphasized more during the convening?

Responses emphasized a need for community, time, and space. There was an acknowledgment that many of the answers are “held in community. That each community has its own particular framework that works for them through many years of use in their community context.”

While some respondents felt the primary barriers to establishing trust came from a lack of time, as well as the remote nature of the convening (community and space), all indicated an understanding that the convening had to happen remotely.

A fourth essential for establishing trust that

emerged in responses was the importance of the facilitators. Facilitators were “a critical part of supporting a trusting atmosphere for these meetings,” they “did just an amazing job,” and “set the stage well to establish trust and ensured there was a safe space for conversations.”

Community was a high-frequency word in responses. This amplifies a need for institutions to balance funding the work while also stepping aside in order to center community frameworks.

One recommendation is to employ MacKenzie Scott and Dan Jewett’s philanthropic approach, which continues funding necessary work by placing solution-making and power in the hands of communities. Short of that, a collaborative approach to the next phase of grant writing, should the Mellon Foundation continue to support this work, would be for OCLC to lend development and financial resources to support the next phase of grant-writing and project design without housing or owning the work.

“The primary barrier to establishing trust in the convening was the briefness of our time together.”

“...we don’t have the answers, and a lot of the answers are held in community. That each community (for me

indigenous) has its own particular framework, that works for them through many years of use in their community context.”

“There could have been more attention paid to what OCLC plans to do with the results of the meeting. For example, products such as presentations, webinars, and otherwise benefiting from holding the meeting and holding

the thoughts and ideas of participants.”

...

“I think it was great to see such a wide variety of professionals in terms of the relative power of positions: some were practitioners, some were

administrators, some were lone arrangers. Speaking as a low-ranking practitioner, being in a space where I felt comfortable to share with administrators without intimidation was very welcome.”

Implementing change

Acknowledgment of harm, creating a safe space, building trust, and cultivating reciprocal relationships requires demonstration and action of change. Respondents gave many suggestions for how to do this and the timeframe in which they would like to see these changes occur.

In continuing to work with OCLC and other power holding institutions on just metadata description projects in the future, 85% agreed or strongly agreed that they would continue to work with these institutions. 15% were neutral. Because institutions are so intricately connected to existing power structures, monetary resources, and other entrenched systems unfavorable to BIPOC and non-centered communities, OCLC and other centers of power must be willing to simultaneously commit monetary resources, implement policy and procedural changes, and alter system-wide approaches that will require relinquishing power.

When asked to rate individual confidence that OCLC and other power holding institutions will forward the work towards just metadata description by changing policies, altering workflows, relinquishing power, and/or re-distributing resources, only 25% strongly agreed. 33.3% agreed. 33.3% were neutral. And 8% disagreed. While it would be easy to celebrate that the majority are confident, the high number of those with neutral and less confidence demonstrates the considerable work that OCLC and other power holding institutions still need to do to build confidence that change will occur.

Any ambivalence individuals may feel regarding the abilities of OCLC and other power holding institutions to change can be remedied.

There are some steps that OCLC and others can take to forward this work in the next six months, one year, and five years. First and foremost is for institutions to “stop talking

and start doing.” Within the field, institutions have the ability to create key performance indicators that must be met at these intervals: six months, one year, and five years in order to apply for and receive major funding. While institutions often hold individual employees responsible for meeting these key performance indicators, institutions must remember that legally speaking, they too are persons. In this respect, they have an equally important responsibility for meeting standards of performance. And in centering the

communities within which these institutions exist, it is those standards which hold most weight in driving the work.

Some other recommendations we heard include: redefining the notion of authority in order to recognize community terms as equally authoritative, having a dedicated space beyond a list-serve for discussion, and development of an agile system for employing community recommendations in a transparent way.

“I think there could have been a clearer sense about how we are expected to be individually responsible for moving this work forward. The convening is important, but now it’s harder to get back to “what’s next” if we don’t have a degree of personal or organizational commitment.”

“I am very ambivalent about OCLC and it’s power (esp given dewey, worldcat, and other projects that have fallen by the wayside) but this definitely improved my opinion.”

“I want OCLC and others to stop talking about it but to do something meaningful that creates some milestones towards the changes we shared during the 3 days. The establishment of key performance indicators that they (OCLC et al) have to meet in 6 months, 1 year etc. so they can achieve the goal we shared in our groups by 5 years.”

4.

Evaluation conclusions

Overall, respondents felt the convening clarified issues, identified priority areas for attention, and provided valuable guidance for developing a concrete roadmap or community agenda of actions and next steps for continuing the momentum of this work. 85% agreed or strongly agreed with that, 12% were neutral and only one individual disagreed.

There is an opportunity to continue clarifying the work more broadly within the field, identifying priority areas and developing a concrete roadmap of actions to take. It cannot be underestimated how important it is to find an organizational home for this work that is not OCLC or Library of Congress, but rather a smaller organization or institution that is more rooted in community and has more flexibility to move quickly, work with a wide variety of stakeholders, and continue to convene an ever-widening network.

As OCLC and other power holding institutions continue this work, it is time for them to reimagine their roles. Free trainings on creating name authorities, submitting new edits, and other processes is critical. In addition, funding a well-represented working group, reducing or eliminating subscription costs and dissolving other barriers for BIPOC and smaller organizations, developing inclusive language auditing tools, divesting from bureaucratic and deeply entrenched racist systems, and radical restructuring of OCLC services are some of the immediate changes community members have asked for.

While some of the above recommendations may take longer than the next six months to one year, OCLC and other power

holding institutions could begin to demonstrate goodwill towards communities who have been affected by harmful and non-inclusive metadata description. Action is clearly needed.

All participants are eager to continue the work and would like to see at least one additional convening held within the next year. 36% would like to see four or more similar convenings held, while 44% are interested in participating in two to three more convenings.

5.

Evaluation purpose and approach

Most broadly, the purpose of this evaluation was to determine the success of OCLC’s “Reimagine Descriptive Workflows” convening, part of their eight-month Mellon-funded project related to inclusive practices in metadata description. Providing opportunities for participants to define success was an important first step in any evaluation project. As a result, this project took a multi-layered evaluative approach that was community driven.

Articulation of outcomes

Starting with the Mellon grant proposal through the convening planning phase, the table on the next page reflects outcomes articulated by various stakeholders in three key areas. To support a community-driven approach, convening participants also had an opportunity to further define success as part of the registration process.

Broad categories	Outcomes articulated in Mellon proposal	Outcomes articulated in OCLC press release	Outcomes articulated by advisory panel	Outcomes articulated during Shift team meetings
Trust-building and space-making	Establish a foundation of trust between community contributors and stakeholders for future community engagement and reciprocal consultation.	Convene a conversation of community stakeholders about how to address the systemic issues of bias and racial equity within our current collection description infrastructure.	Create a safe, engaging space where honest and inspiring conversations can occur.	Facilitate multi-day conversation between OCLC and community contributors that results in action.
Convening	Convene a diverse group of experts, practitioners, and community members in order to examine and learn from these localized efforts and determine ways to improve practices, tools, infrastructure and workflows at scale and at a community level.	Share with member libraries the need to build more inclusive and equitable library collections and to provide description approaches that promote effective representation and discovery of previously neglected or mis-characterized peoples, events, and experiences.	Open the structures and systems, so participants can understand the history, inner workings, and power dynamics of OCLC; provide reckoning/accounting of the white supremacist history and language, as well as acknowledgment of the contributions of people (BIPOC) doing the work.	Strengthen a network of practitioners.
Dissemination	Publish a community agenda to inform research, learning, and other actionable steps that libraries, archives, and allied organizations like OCLC can take to reimagine descriptive practices in the records they steward.	Develop a community agenda that will be of great value in clarifying issues for those who do knowledge work in libraries, archives, and museums; identifying priority areas for attention from these institutions; and providing valuable guidance for those national agencies and suppliers.	Develop concrete plans and steps for OCLC to take, as well as actions to keep the momentum of this work going.	OCLC accepts responsibility, takes on the work, and changes their approaches.

Data collection tools and evaluation activities

Data was collected primarily through the use of live observations of convening conversations, video recordings of the convening days, synchronous and asynchronous use of a web-based, collaborative whiteboard, pre- and post-convening surveys, discussion notes, and daily interactive polls. Long-term data collection and evaluation will involve six-month and twelve-month participant surveys.

Activities reported below include findings from short-term data collection and evaluation:

- Shift Collective and OCLC convening design/planning discussions
- Pre-convening data on attendees collected through questions included on convening application
- Convening observations/discussions
- Day 1, 2, and 3 “exit” surveys
- Analysis of collaborative whiteboards
- Post-convening attendee survey, analysis, and reporting

6.

Scope of Shift Collective's consultation work

Shift Collective worked with OCLC and the broader library community to create an immersive two-day virtual gathering with the suggested title of “Radical Reimagination of Descriptive Practices in Archives and Special Collections.” The convening was designed with the intention of building trust between communities in which there is already conflict, ensuring that all participants are heard and incorporated into the creative process, utilizing Community-Centered Design principles, and capturing proceedings in a way that provides clear direction toward future action. The key outcome of the convening was to be a report that lays out actionable steps that library cooperatives like OCLC, academic libraries, community-based archives, and archivists can take to reimagine descriptive practices in the records they steward.

Shift Collective's role, as initially proposed:

- **Phase 1. *Initial Planning and Design.*** The Shift team will work with the OCLC team to better understand the various internal and external stakeholders, current state of metadata description, general overview of current systems, systems change in development, and intended outcomes. The deliverable of this phase will be a document outlining the agreed objectives and intended outcomes of the work, and a basic theory of change for the planning project.
- **Phase 2. *Retreat Planning and Co-Facilitation.*** In the second phase, we'll focus on planning for the retreat experience, in close coordination with the OCLC team.

Deliverable is documentation of meeting technology, methodologies to be used for trust-building and co-design, a plan for some sort of social event which may include creation of packages for participants, potential attendees, content, design exercises, OCLC/Shift Collective roles, and other details covering the retreat.

- **Phase 3. *Retreat Co-Facilitation.*** All activity in this quarter revolves around the retreat experience. Intended outcomes defined in Phase 1 and shaped into programming in Phase 2 will come together in this intentional convening that will give all participants a part to play in actual design definition and prototyping. The deliverable is the event itself, as well as joint documentation of the activities, and particularly the outputs of rapid prototype designs that will be presented at the end of the convening.
- **Phase 4. *Documentation and Dissemination.*** Shift Collective will coordinate with OCLC and lead on the creation of documentation of the process, articulation of next steps, and tools for carrying out and evaluating further actions.

7.

Program activities and methodology

While the initial scope of work outlined above provided a blueprint for our activities, we found that we significantly underestimated the work required to prepare OCLC and Shift Collective teams to work together and to create an environment for building trust between major centers of power in the library and information sciences landscape and local and historically marginalized communities.

In order to prepare the ground for this initial major convening, we created a process to better understand the power dynamics at play in the field and address the needs of a wide variety of stakeholders and provide the space to meet together. This process requires time for discovery, equity analysis, and trust building that is rare not only in the cultural memory field, but most sectors today.

Recruiting a diverse core team

As denoted in our name, Shift Collective consists of members that come together on a wide variety of projects. Our founding members, Bergis Jules, Jon Voss, and Lynette Johnson are leads on particular projects and we augment our team with consulting partners best suited for the job at hand. We strive to create measurable and lasting social change by developing inclusive cultural memory experiences that give voice to unheard narratives and perspectives. We help communities tell and amplify their own stories, so that incomplete dominant narratives do not persist. We are focused on inclusive narrative and historical representation in order to support social, cultural and resource equity.

For this project, we wanted to bring on a diverse team that was uniquely suited to help us understand the challenge space we are

addressing, create a unique experience within the constraints of a global pandemic, and measure the social impact of the work.

Jon Voss and Bergis Jules of the core Shift Collective worked with Rachel Frick on the initial project design, and Jon led the project on behalf of the Shift team.

We recruited Jennifer Himmelreich to join the team as domain expert, convening designer, and facilitator. A librarian and the Native American Fellowship Program Manager at the Peabody Essex Museum, Jennifer has led research for Shift Collective in the past² and participated in our field building convenings. She brought a deep understanding of the work in indigenous communities and unique cultural knowledge systems specific to local groups.

Tayo Medupin joined the team as lead convening designer. An independent consultant (see <https://www.hellobrave.org/>) and design expert, Tayo has worked with Shift Collective on several other convenings, most notably Architecting Sustainable Futures, a Mellon Foundation funded convening that led to the creation of a new \$2.2m funding stream for community-based archives.³

Gerry Himmelreich was recruited for his community-centered approach to evaluation. He holds graduate degrees from both Hollins University and the Institute of American Indian Arts. Using a community-centered approach to guide projects, Gerry's recent engagements include culturally-relevant curriculum design and assessment projects for New England's Native Plant Trust and the Peabody Essex Museum's Native American Fellowship Program.

We asked poet, artist and producer Asante Salaam to join our core team in order to offer a truly unique cultural experience as part of our virtual convening. She expertly guided us in creating cultural immersion activities as a key part of not only the event, but in all of the planning and facilitation leading up to and throughout the convening.

² See Moving Beyond Colonial Models of Digital Memory, a report based on findings from planning grant LG-72-16-0113-16 by the Institute of Museum and Library Services. Accessed July 19, 2021: <https://www.shiftcollective.us/casestudies3/decolonizing-digital-memory>

³ See Architecting Sustainable Futures, a report based on findings from a research grant from the Andrew W. Mellon Foundation. Accessed August 11, 2021: <https://www.shiftcollective.us/casestudies3/asf>

We brought Shift Collective founding member Lynette Johnson in as we got closer to the convening to provide additional facilitation and reporting support.

Equity, power, and stakeholder analysis

Before we could begin the work of bringing a geographically, ethnically and racially diverse group of scholars, practitioners, and information science professionals together, we needed to better understand the state of the field and the equity and power dynamics already at play. This work, done in collaboration with the OCLC team, was a combination of a literature review of current published work on metadata description, analysis of the field and major thinkers/practitioners working in this particular nexus, and a brief analysis of OCLC's internal work and commitments to racial justice and equity to date. Much more time could be spent in this area as a future scope of work.

We worked with OCLC to identify a list of advisory panelists to approach that would give us the right start with a broad diversity of people, institutions, and roles that would in turn help attract an appropriately balanced group of participants.

Internal team building

The next phase of work focused on internal team building to strengthen intersectional connection within our core team, with the OCLC team, and with the advisory panel. This often required adjusting expectations and corporate workflows at OCLC in order to acknowledge past harm with individual communities and make way for long-term trust building. For instance, things like traditional public relations activities and press releases were asked to be postponed or canceled in order to begin our work together not as public announcements but as individual commitments that might have the power to grow to a level of institutional support for actual racial justice and equity.

This phase involved several weeks of 1:1 and group meetings to listen to concerns, get to know each other, and better understand the intentions and needs of a wide variety of stakeholders.

Convening design

Shift Collective focused on the convening design while the OCLC team worked on inviting a diverse and balanced group of attendees. We explored several models for the convening based largely on input from the advisory committee as to the needs of the participants. Knowing that this was a virtual convening spanning time zones from Australia to the eastern US and Canada, we only had 2-3 hours of synchronous time to work together. We were also facing serious Zoom burnout after more than a year of pandemic restrictions and wanted to be sure that cultural inclusion and immersion activities helped create a welcome and participatory environment.

After initial conversations with the OCLC team and advisory panel, we had settled on two options for the approach to activities within the convening: either focusing on big ideas, which has the potential to be uplifting and big picture, but may lack more tactical outcomes; or focusing on change, which has the potential to be more emotionally taxing, detail oriented and with outcomes that would point the field toward actionable next steps. In pursuing these options with stakeholders, there was a consensus that people at this point are looking at more concrete and actionable next steps that begin taking solutions to scale.

Accordingly, we designed the convening to include space for critical trust building, but that also moved quickly toward exploring roadblocks and opportunities for change and into workshopping ideas for moving forward as a field.

The convening

The three-day convening took place June 22-24, 2021. Participants applied to attend via a web-based application form and were selected for broad representation and active work in the topic area. Participants were eligible for a \$500 honorarium to compensate them for their time, though not all participants elected to receive the funds. We communicated with participants via email prior to the meeting, and the meeting took place on Zoom, together with a Miro digital whiteboard for group work.

Aim of session:

- Create a safe space to share and connect honestly as humans.
- Lay the foundations for relationship building and repair.
- Building a basis for reciprocal relationships between communities and centers of power.
- Inspire radical thinking to rebuild a more just metadata infrastructure.
- Build a concrete roadmap for change in the sector and keep conversation going.

Resources:

- Facilitator training (see [briefing](#))
- Briefing [scripts](#) / [all videos here](#) unless listed below
- [Miro board](#) (shared gathering space, commons)
- [Google drive folder](#) (shared documents)

Reimagine Descriptive Workflows Convening:

A focus on laying foundation for change

Attendees: 42. **Lead facilitators:** 3. **Guides:** 7.

Platforms: Zoom, Miro and Google Docs.

Framing essays: We decided to not do framing essays in order to not tilt the conversation too much in one direction or another, and keep the discussion open to needs that would be identified throughout the convening.

Welcome packages: Led by the OCLC team, welcome packages were sent to all participants and contained a cookbook by a self-published Black New Orleans author, pralines from a popular Black and woman-owned bakery, convening-branded notebooks, mixed nuts from Ohio, and a plastic tumbler, all to encourage a sense of connection, sustenance, fun and at least a taste of travel to New Orleans.

Community norms/Meeting agreements: Share the space, step forward/step back; listen and share bravely; listen for understanding; sense and speak your feelings; use “I” statements;

discomfort is not the same as harm; no ‘Alphabet Soup,’ (avoid acronyms); be kind to yourself and others; take care of your needs; feel free to add others in your group.

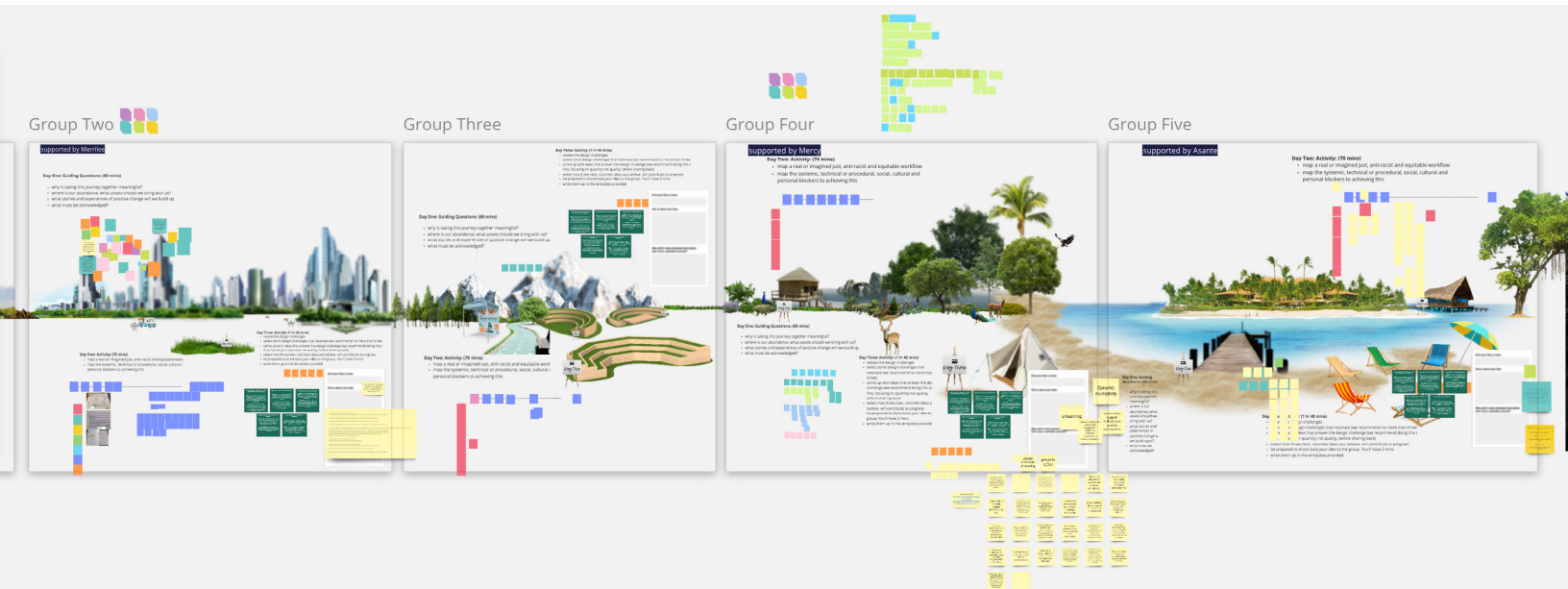
THREE-DAY CONVENING AGENDA, TOP LEVEL:

	Day One: Composting	Day Two: Weeding	Day Three: Seeding
Pre	Receive Welcome pack. (Congo Square video intro)	Self-reflection	None
During	2 hours: What is driving us forward 15: Extended welcome and briefing. 70: Unfacilitated groups of five. 5: Break 20: Group reflection 10: Close [2-min video outro]	2 hours: What's holding us back 10: Welcome, recap and briefing [Part 2-Roundtable welcome video] 75: Unfacilitated groups of five. 5: Break 20: Group reflection 10: Close (2-min video outro)	3 hours: Opportunities for change 15: Welcome and briefing [Part 3-Roundtable welcome video] 115: New facilitated groups of five. 40: Group shareback and celebration. 15: Close [10 minutes: video of two New Orleans musicians playing live music – dirge into celebration; meaningful, powerful, change, inspirational songs]
After	Programming Edgar Sanchez Team task: Clustering the themes	Programming Exploring Stories of Creole Cuisine Team task: Create design challenges	Programming Music, commitments and networking. 60 min – social (with New Orleans playlist)

8.

Activity outputs

The primary activities of the three days followed the Shift Collective methodology of Community-Centered Design, though time and space constraints required an abbreviated and rapid approach. We created seven groups of about seven people each with a guide for each group to help the groups stay on task and utilize the shared technology. To attempt to strike a balance between trust building and the chance to expand networks, the groups were together for the first two days, and then we shuffled them for the third day.



In this screenshot of the Miro Board, you can see that each group had a collaborative online space for working together that would give some simulation of being in the same physical space and being able to use digital whiteboards and sticky pads.

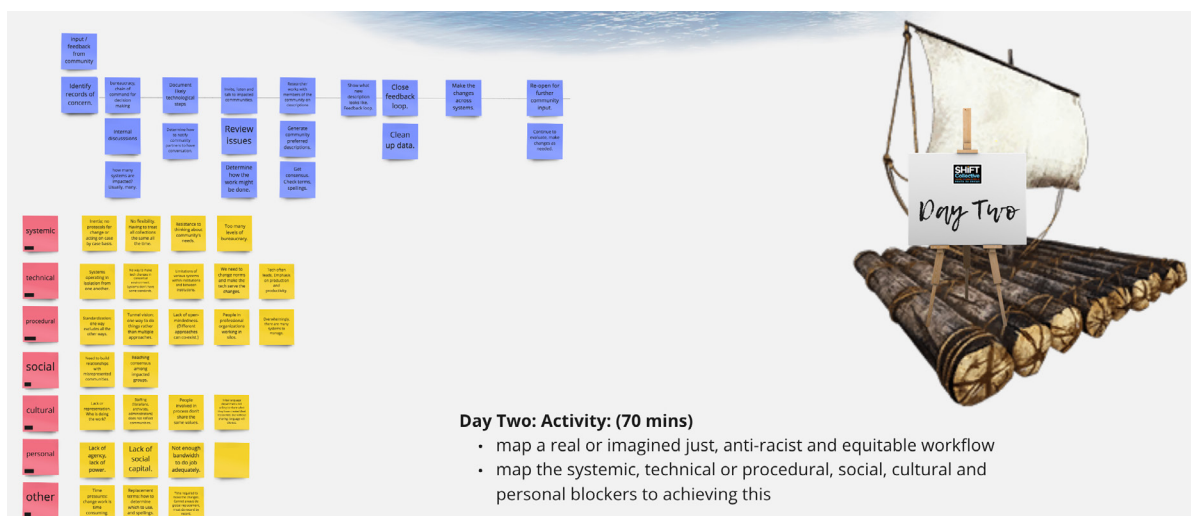
The first day's small group activity invited participants to look at what motivates us to do this work and where our greatest assets and resources are that we can use to begin finding ways forward. We asked participants to use these four guiding questions, and facilitators recorded their thoughts on sticky notes that our team could sort into themes.

Day One: Guiding Questions: (60 mins)

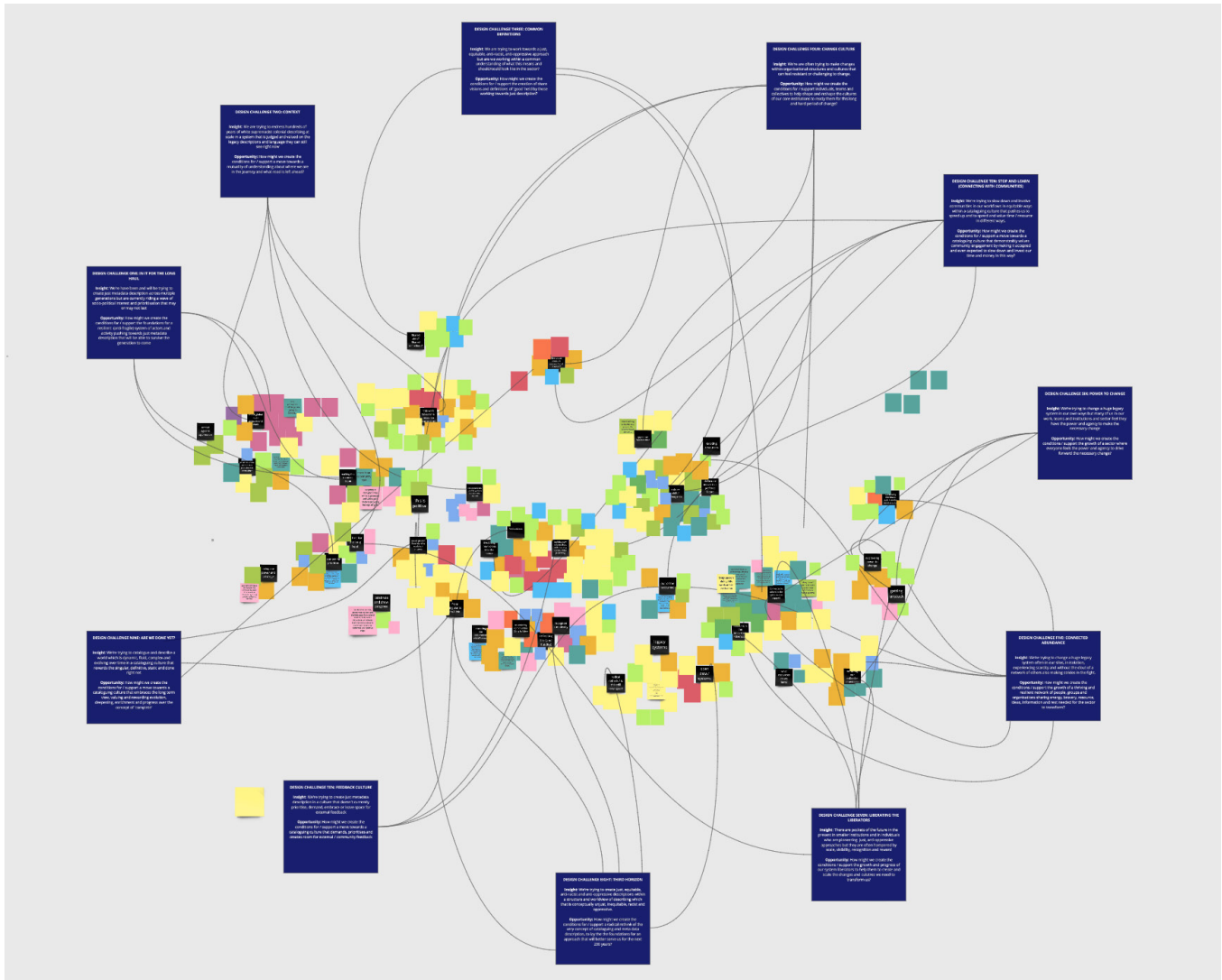
- why is taking this journey together meaningful?
- where is our abundance, what assets should we bring with us?
- what stories and experiences of positive change will we build upon?
- what must be acknowledged?



The small group activity on the second day moved quickly into identifying opportunities for change within a broad view of “metadata description workflows.” This was pretty high level, as those workflows can vary greatly depending on your institution and particular role, but most of the groups were able to come up with a rough workflow that they could then begin identifying ideals and blockers. These were again noted on sticky notes across all of the groups’ shared spaces.



The facilitation team, led by Tayo, brought all of the notes together to begin identifying themes and opportunities that could be formulated into a set of design challenges for Day 3's activity.



This is a zoomed out view, but after Day 2, clear themes began to emerge in the clusters, with the black sticky notes calling out themes.



A sample closer look at how the themes were practically assembled.

Initially, Tayo identified eleven design challenges⁴ that spoke to the themes, which were then narrowed down to five design challenges with the input from the Shift Collective and OCLC facilitator team.

The ‘Design Challenge’ and what we learned:

The Day 3 activity presented a newly configured set of seven groups with the choice of one of five different design challenges related to the themes that came out of the group work on the first two days. The point of the design challenge, especially with the limited amount of time we had to commit to the exercise, is really to give us information about what this group thinks is the most important and most doable work in the near term. We also learn from the group work and from the report-outs what possible tactics and longer term strategies may exist. This is meant to be a first pass at a big picture

⁴ These 11 themes are listed in detail in Merrilee Proffitt’s July 22, 2021 blog post, Reimagine Descriptive Workflows: meeting the challenges of inclusive description in shared infrastructure, available here (as accessed August 25, 2021): <https://hangingtogether.org/?p=9424>

problem, but it gives us very meaningful insights (also reflected in the evaluation section above) into the potential starting points for making structural change.

In the small groups of Day 3, people were asked to vote and come to a consensus on which challenge resonated the most with them, and what they would most like to work on. This exercise, as well as the process of narrowing down the themes, would normally be done together with the entire group over more time, and some challenges might have further been dropped, merged, or expanded upon according to everyone's input. Even without having the time to do that exercise, we do get some data based on which challenge the groups decided upon, and in their report out we often heard that they did some combining of challenges on their own to tackle what they saw as the most important issues.

We'll look at each of the five challenges below, as these were the themes that came from two days of work together and give us a great sense of potential opportunities identified by the entire group. For each challenge, we also explore what we learned both in the formation of the challenge and in how people responded to it in their working groups.

Please note that this is a brief summary of the design challenge phase of work — with further funding, there is a lot here that will be foundational to further opportunities to take a community-centered design approach to systems change in the field.

DESIGN CHALLENGE ONE: STOP AND LEARN (CONNECTING WITH COMMUNITIES)

Insight: We're trying to slow down and involve and get feedback from specific communities in our workflows within a cataloging culture that doesn't currently prioritize, demand, embrace or leave space doing this work in meaningful and equitable ways.

Opportunity: How might we create the conditions for / support a move towards a cataloging culture that demonstrably values community engagement, demanding, prioritizing and creating room for external / community involvement and feedback.

What we learned: This was a strong theme that came up in several of the small groups in Day One and Two, in a variety of contexts. Ultimately, we decided that the opportunity here is to consider how systems might be adapted, changed or created to provide the chance for communities to either participate directly in the metadata workflows, or for metadata creators to at least listen to community concerns in creating these information systems.

We heard several examples of how this is beginning to be implemented in some systems, where you may have community advisory boards or external stakeholders as part of the formal process of creating vocabularies or community-specific metadata. A frequent barrier to systems like this is the time crunch of overworked library staff or massive backlogs of materials to be cataloged. Changing the expectation of how quickly things need to happen in institutions can be a major step toward a community-centered approach.

Interestingly, none of the seven working groups chose to take on this design challenge, which is telling in and of itself. It brings up questions of whether or not people think this is a realistic change that can be made, or if other issues just seem more pressing or even more comprehensive or foundational.

DESIGN CHALLENGE TWO: ARE WE DONE YET?

Insight: We're trying to catalog and describe a world which is dynamic, fluid, complex and evolving over time in a cataloging culture that rewards the singular, definitive, static and done right now.

Opportunity: How might we create the conditions for / support a move towards a cataloging culture that embraces the long term view, valuing and rewarding evolution, deepening, enrichment and progress over the concept of 'complete.'

What we learned: This challenge has some overlap with Challenge One, most notably in addressing the need for a cultural shift away from institutional ownership and white supremacist worldviews and toward centering in a multitude of cultures and communities. It underlines the problem with seeing metadata creation as a task with

a defined end, and seeks the opportunity of creating a process that is iterative and collaborative instead.

One group took on this design challenge and outlined a project called Living Systems: Description For A Just Metadata Ecosystem that had the following description: “A pilot project that aims to replace institutional ownership of description to personal ownership of description. From institutional owners to institutional facilitators, listeners, and action-takers as guided by individuals directly impacted by the description.” The group considered how we might create shared principles that define the concept of “just description” that could allow for a measurable scale; they looked at how community engagement and shared ownership could be built in; they considered what types of technical needs such a system would have; and finally, they looked at potential policy changes that would be needed to support such a system.

The approach of a “living ecosystem” was an important recognition by this group of the many moving parts and inter-related organizations and communities with an interest and hopefully a say in how we describe our world and shape information to meet our needs.

DESIGN CHALLENGE THREE: THIRD HORIZON

Insight: We’re trying to create just, equitable, anti-racist and anti-oppressive descriptions within a structure and worldview of describing that is conceptually unjust, inequitable, racist and oppressive.

Opportunity: How might we create the conditions for / support a radical rethink of the very concept of cataloguing and metadata description, to lay the foundations for an approach that will better serve us for the next 200 years?

What we learned: This was the design challenge taken on by three groups, the most popular of the challenges, and perhaps the most daunting of them all. This fact underlines that participants in this convening were ready for a fundamental change in information science as it is currently taught, practiced, and perpetuated.

Core to this challenge is the recognition that it may not be possible to build a just and equitable system within the overall framework of information science that is by its very nature and design focused on a Eurocentric and/or white supremacist worldview. The only way to truly change this system is to bring into existence the conditions for an entirely different approach for a system that may serve us better over the next 200 years.

In thinking on this scale and considering what it may take to move in this direction, the three groups looked at a wide variety of different lenses for how we might approach this.

One group considered “vocabularies of liberation,” and leaned heavily on the promise of Linked Open Data and current web technologies that give us possibilities of scale unfathomable to those creating card catalogs of old. In addition to the raw computing power now available, we have the technology to place description tools directly in the hands of a wide variety of communities and greatly increase, add to, or overwrite the limits of Library of Congress Subject Headings, and the major problem that they are politically controlled.

A second group took a high level approach to this design challenge, titling their work Dynamic Multiplicity, seeing it as the foundation of all of the challenges in this space. Their three pillars of work were structured around unlearning existing methods and biases, creating conditions for co-creation with individual communities, and developing systems that support multiplicity in all of its connotations. There was also a stress on decoupling the responsibility of training white staff from the (most often uncompensated) duties falling to BIPOC staff rather than investing in external training for all staff in cultural sensitivity, diverse vocabularies, non-white history, etc. There is also a constant struggle of having to make unjust accommodations to assuage the guilt, discomfort, or lack of education of white colleagues or leadership, which must be acknowledged and addressed.

A third group focused on rethinking authorities and the many permutations of authority in our current systems, from European and hierarchical focus to time constraints that favor an existing knowledge base versus one of co-creation. They imagined a system

that would allow for catalogers to choose from many vocabularies and to just as easily use a community term as an authorized term. They too acknowledged the role of web technologies and algorithmic tagging and ranking systems that are native to younger consumers of data, and saw this as an opportunity for creating a new foundation to build upon.

DESIGN CHALLENGE FOUR: LIBERATING THE LIBERATORS

Insight: There are pockets of the future in the present in smaller institutions and in individuals who are pioneering just, anti-oppressive approaches but they are often hampered by scale, visibility, recognition and reward.

Opportunity: How might we create the conditions / support the growth and progress of our system liberators to help them to create and scale the changes and cultures we need to transform us?

What we learned: This design challenge is one of two that looked at needs and opportunities identified in the first two days around the network of change-makers key to creating a grassroots and distributed movement to make internal change and create counter cultural alternatives that can ultimately overtake the dominant paradigm. Specifically, this design challenge looks at supporting individuals and amplifying their work.

One group explored this topic with *Let's Get Free: Galvanizing Support and Normalizing Change*. They too stressed the importance of changing the culture of time within institutions and shifting from a focus on production to one of normalizing change and centering the long term importance of community, diversity and cultural competency. The methods for making this change were both organizational and educational, with an emphasis on shared responsibility.

DESIGN CHALLENGE FIVE: CONNECTED ABUNDANCE

Insight: We're trying to change a huge legacy system often in our silos, in isolation, experiencing scarcity and without the clout of a network of others also making strides in the fight.

Opportunity: How might we create the conditions / support the growth of a thriving and resilient network of people, groups and organizations sharing energy, bravery, resources, ideas, information and rest needed to transform practices and the culture of the sector?

What we learned: This design challenge looks toward the importance of strengthening networks to sustain long-term change, which was validated by the fact that two groups chose to dig into this.

One group looked at taking advantage of existing library networks and associations and the potential power that could be leveraged with a project they called *Connecting our abundance for the long term: leaning into existing (professional and community) networks, and expanding our circle*. This effort would aim to center network development as an important aspect of library and information science jobs, and also envision themselves as activists within national and international associations, using surveys and other mechanisms to bring this work into library conferences. Additionally, making this everyone's job to lift the responsibility from people who are called on again and again.

A second group developed a concept they called *Freeing Us From Excuses: Library Free School*, which considered how to build on our abundance through a host of peer-supported resources for the spectrum of information workers, from library school educators to institutional leaders. Providing possibilities for cross-institutional affiliation cohorts (i.e. indigenous catalogers, etc), as well as spaces outside of institutions like maker spaces to develop toolkits, this concept laid out an array of tools and approaches to balance bigger and smaller organizations in a way that could support bottom-up resource sharing.

Design Challenge summary

Each of the design challenges presented us with rapid ideation for potential pilots and prototypes that could easily be scaled with additional funding and give this network the opportunity to begin implementing a set of ideas that can continue to grow and support change-makers in this space. While they weren't intended to be developed wholesale, they do give us strong indications of

actionable themes that together can begin to create a framework for future strategy toward system change around metadata description workflows, and ultimately more just and equitable systems of knowledge organization from diverse and equally valued perspectives.

9.

About Shift Collective

Shift Collective (shiftcollective.us) is a New Orleans-based 501(c)(3) non-profit corporation. We support and design community-driven initiatives to increase social, cultural and resource equity. Through our work on projects like Architecting Sustainable Futures, Cultural Heritage and Social Change Summit, Moving Beyond Colonial Models of Digital Memory, Historypin, One Story Closer, and the Sustainable Futures Blog, we are committed to an inclusive record of our shared cultural heritage, and collaborative and equitable approaches to deep community-based initiatives.