# Challenges and strategies of museum-based critical cataloguers


## Abstract

*Purpose*

Literature on critical cataloguing in museums is sparse and focuses on descriptions of projects, leaving absent insights about the human aspect of this work. This paper addresses this gap by analysing the experiences of museum-based critical cataloguers, identifying the types of challenges they face in their work and strategies they use to advance critical cataloguing efforts.

*Design/methodology/approach*

The author interviewed twenty-four individuals who work in or with museums on critical cataloguing initiatives. They analysed these interviews using a priori and in vivo coding methods with attention to the interpersonal relationships and affective experiences described by interview participants in order to formulate an understanding of critical cataloguer experiences, challenges, and strategies.

*Findings*

Critical cataloguers in museums face seven types of challenges and employ six types of strategies. As critical interventions into museum practice, these challenges and strategies are ultimately about the context in which museum documentation practice sits: the challenges that critical cataloguers face relate to struggles for institutional change, and the strategies they use focus on making such change possible.

*Originality*

This paper details the first study on the experiences of museum-based critical cataloguers. It positions this work as part of wider efforts to change the ways in which museums show up in their relationships with staff, visitors, and publics, and connects museum-based critical cataloguing to broader dialogues on ethics of care in documentation practices.



## Keywords

museum, cataloguing, critical cataloguing, inclusive description, challenge, strategy

## Article classification

Article – research paper.


## Introduction

Cataloguing is a foundational museum practice. In this context, ‘cataloguing’ refers to the creation and management of information about collections, encompassing both the practice and product of object documentation (Collections Trust, 2017). Cataloguing information is structured as object metadata and is typically held in a museum’s collections management system (CMS), software which has been developed for this purpose. The information contained in a CMS is used by museum staff in their work to understand, manage, and display collections, but it is also seen by museum publics. Museum visitors encounter this information through object labels in exhibition spaces, and online collections enable global access to comprehensive object records. Consequently, details of what museum catalogue records contain, including the language used to describe peoples, places, and cultural belongings, are more visible than ever.

One aspect that has indeed been made visible is the presence of offensive, biased, and outdated language in museum catalogue records (e.g. Campbell and Smith, 2024; Dalal-Clayton and Rutherford, 2022; Zalm, 2024). In response, critical cataloguing has emerged: this term refers to a working practice where museum staff seek to

understand and address the presence of problematic language in their records. This work can manifest in forms such as reviewing and updating language in records, adding content warnings about language used in records, adding paradata to record entries, and more (Author, in press). Critical cataloguing requires new, collaborative ways of working and entails complex decision-making situated to the context of the institution and specific issue at hand (Dalal-Clayton and Rutherford, 2022; Midavaine *et al.*, 2025). This work can be seen in relation to other initiatives which seek to decolonise museums and make them more diverse, equitable, and inclusive spaces for staff and visitors as part of a movement of reparative museology (Sterling, 2025). Critical cataloguing focuses on museum documentation, interrogating how issues of inequality manifest in museum cataloguing as a product and are perpetuated through it as a practice.

The term *critical cataloguing* originates in library and archive studies, and significant bodies of literature exist on critical documentation practices in these fields (Watson, 2023). However, relatively little is known about how museums are engaging in critical cataloguing work. Furthermore, the literature that does exist focuses on descriptions of projects but leaves out the experiences of critical cataloguers, the challenges they encounter, and the strategies they use to develop and advance critical cataloguing initiatives. This paper seeks to address this gap by considering two research questions:

- RQ 1. What challenges do museum-based critical cataloguers experience during or as a part of critical cataloguing work?
- RQ 2. What strategies do museum-based critical cataloguers use to address the challenges they experience, or to otherwise advance their work?

The research and findings described here take place in the context of the author's doctoral research on critical cataloguing in museums. The scope of the present paper concentrates on challenges and strategies of critical cataloguers: this paper looks to frame an understanding of the experiences of critical cataloguers working in and with museums through an examination of the ways they try to achieve their goals and the challenges they experience during their efforts. The study of critical cataloguer experiences is done through semi-structured interviews conducted with two dozen individuals from institutions and independent practice across the United Kingdom (UK), the United States (USA), and Canada who engage in critical cataloguing practices. This paper evidences the importance of interpersonal relationships and affective experiences in critical cataloguing work, and identifies seven types of challenges and six types of strategies of critical cataloguers working in and with museums.

## Background

Little academic literature has documented what is taking place in museums under the heading of *critical cataloguing*, the umbrella term for approaches to addressing the presence of offensive, biassed, and outdated language in catalogue records. Instead, information about these practices can be found in grey literature developed by practitioners and aimed at fellow museum professionals (for a detailed discussion of literature on museum-based critical cataloguing, see: Author, in press). However, recent publications highlighting the work of critical cataloguing in museums indicate that its dissemination is beginning to enter traditional academic publishing spaces. The edited volume *Collections Management as Critical Museum Practice* includes two chapters on critical cataloguing (Krmpotich and Stevenson, 2024). The March 2024 special issue of *Collections: A Journal for Museum and Archives Professionals* contains eleven research articles on the complexities of cataloguing and working with museum collections data, four of which detail museum-based critical cataloguing projects (Campbell and Smith, 2024; Carreau and Gunn, 2024; Christophe *et al.,* 20024; Lewis, 2024).

While this literature begins to describe museum-based critical cataloguing work, the experiences of the individuals involved remains absent. Authors may acknowledge that critical cataloguing work is complex, labour-intensive, and ongoing, but these challenges are not discussed as aspects of the work being described (e.g Carreau and Gunn, 2024; Woodward and Kerr, 2023; Zalm, 2024). Strategies can be elicited from described methods but are also rarely explicitly discussed; for example, the reference made by three museums to using the Cultural Heritage Terminology Network's Inclusive Terminology Glossary can be understood as a strategy to use domain resources to apply existing solutions to local contexts (Adams, 2024; Campbell and Smith, 2024; Woodward and Kerr, 2023). Two staff members at the Museum of Archaeology and Anthropology, University

of Cambridge describe integrating critical cataloguing into catalogue review during a storage move: the strategy here may be to act when another project offers an opportunity for critical cataloguing (Carreau and Gunn, 2024).

Four studies on practitioner experiences have taken place but address librarians, archivists, or broader related museum practices. Here I discuss the methodologies of these studies to evidence the absence of the museum-based critical cataloguer's perspective in existing literature; the findings from these studies regarding challenges and strategies are discussed below in 'Situating challenges in the literature' and 'Situating strategies in the literature'. First, Sharon Heal interviewed 14 museum professionals from across the UK about their work in museum activism, providing a glimpse into the experiences of museum workers seeking to make change in and through their institutions (Heal, 2019). Second, Christina Kamposiori surveyed members of Research Library UK to learn about the needs of librarians engaged in work intended to make their collections more diverse and inclusive (Kamposiori, 2023). The survey included multiple choice and open-ended questions that asked participants about the types of projects that their libraries were engaged in along with details about how and why participants participated in this work. Although this study exclusively targeted research libraries, over a quarter of respondents (26.23%) reported that museum collections were within the scope of the work taking place at their institution (Kamposiori, 2023). Third, Treshani Perera sought to understand how and why information professionals participate in initiatives intended to increase the diversity and inclusivity of collections through metadata and description (Perera, 2022). An online survey comprised of multiple choice and open-ended questions was distributed through library, archive, and museum online channels; however, only 3% (n=4) of participants were museum employees (Perera, 2022). Lastly, Stephanie Luke and Sharon Mizota took a targeted approach to participant recruitment for their research on a similar topic: they approached institutions who had published or presented on reparative description work between 2017 and 2020 and interviewed representatives from 19 institutions, five of which were museums (Luke and Mizota, 2024). However, representing a museum does not guarantee that these participants worked with object records: only one of these five museums included a collections staff member, with the others being represented exclusively by archivists or librarians working within the archive or library of a museum, and not with museum object collections information. Therefore, although two studies included museum staff participants, the gap remains in understanding the experiences of critical cataloguers working in museums with museum object records.

## Methodology

### *Study design*

In order to address the gap in literature regarding critical cataloguing in museums, a study of critical cataloguing practitioners was developed in which five topics were discussed during 45-minute semi-structured interviews: what critical cataloguing work entails; why individuals engage in it; beliefs about the importance of critical cataloguing; how available methods and tools help or hinder critical cataloguing work; and reflections on the goals, outcomes, and successes of critical cataloguing projects. This research was approved by the University of Oxford Medical Sciences Interdivisional Research Ethics Committee (R81821/RE001). See Appendix A for data availability statement and list of guiding interview questions.

Recruitment was done via email listservs and snowball sampling.[1] The call for participants specified that participants needed to have worked at, for, or with a museum and have participated in critical cataloguing work that addressed museum data in order to reach the widest range of stakeholders in this area. For example, limiting the participants to only those who were employees of a museum would mean that this research would fail to capture the experiences of contract workers or individuals who are employed by universities but who work with museums; this would be narrowing the pool of potential participants in a way that would risk creating an inaccurate picture of the field and the realities of museum employment practices.

### *Coding and analysis*

Interviews were conducted by the author online using Microsoft Teams between December 2023 and July 2024. Interviews were audio recorded, transcribed, and coded by the author using the qualitative data analysis software NVivo following a five-stage coding and memoing model where two cycles of coding and memoing are used to drive the identification of categories, themes, and theories (Saldaña, 2021). A combination of deductive and

inductive coding methods were used for the first cycle of coding, with a preliminary set of a priori codes used to guide structural coding of the elements of the interviews that directly related to descriptive elements of the research questions. Inductive coding was used while doing intensive and repeated reviews of the transcripts in order to surface the aspects that participants considered important to talk about but that did not correspond directly to any single one of the interview questions. The inductive codes from this stage fell into two main in vivo coding methods: affective codes and versus codes (Saldaña, 2021, pp. 159-183). What was starting to emerge was the significant role that values and beliefs played in participants' motivations, decisions, and evaluations, as well as the tensions, balances, contradictions, and conflicts they negotiated during critical cataloguing work, along with where these areas intersected.

A second cycle coding plan was then developed, in which the author iterated between interview transcripts, memos, codes, and related literature, in particular publications on applied ethics in the settings of cultural heritage institutions and case studies of critical cataloguing in museums. The first cycle codes were grouped into broader categories by articulating the question that each code was intended to help answer at the analysis stage and grouping those questions into analytical categories. Relating these questions and themes to the literature also highlighted where first cycle codes were tangential to the emerging analysis, and so these were dropped from the second cycle coding plan. At the end of this stage, seven themes were developed, five of which were to be coded a priori—'doing the work', 'the work in the institution', 'the work in the domain', 'the work in the wider world', and 'the individual in the work'—and two which were to be coded in vivo—'affect in the work' and 'tensions in the work'. These themes reflect the emerging theory that a theoretical framework which emphasises the role and importance of interpersonal relationships as well as affective components would support a robust analysis of the interviews. This coding plan was then applied to the interview transcripts, the results of which will be discussed below.

### *Participants*

Twenty-five interviews were conducted with participants from the UK, USA, and Canada. Twenty-three of these interviews were used for analysis; the two that were not included were removed as the participants were found to fall outside of the participant definition after the interview had taken place. In the 23 interviews analysed, 24 individuals represented 19 places of work: three participants discussed experiences at two institutions, and three institutions were represented by more than one participant.[2] Of the 19 workplaces represented by the 24 participants, over half (n=10; 52.63%) are located in North America: nine (47.37%) are in the USA, and one (5.26%) is in Canada. The remaining workplaces are located in the UK: eight (42.11%) are in England and one (5.26%) is in Scotland.

The majority of participants (n=17; 71%) worked for museums, with four participants (17%) working for universities and three (12%) working as consultants. Amongst the participants who worked for museums, the most represented department was collections information (n=7) followed by digital and information technology (n=3), curatorial (n=3), library and archive (n=3), and interpretation departments (n=1). Museum-based participants also represented a range of seniority levels: four participants worked as directors (director n=2; assistant director n=2), three as curators (curator n=1; assistant curator n=2), three as managers, and two as administrators/analysts. The most represented position was at the level of cataloguer/information specialist (n=5). The university-employed participants were equally split between working as academics (n=2) and working in digital and information technology departments in administrator/analyst roles (n=2). Two of the consultants provided services for collections information departments in museums, and one worked with digital and information technology departments in museums.

These descriptions of participants are complicated by the realities of cultural heritage employment practices: for example, two participants currently employed by universities previously worked for museums and these former workplaces were the focuses of the interviews. Additionally, different institutions are structured differently, so descriptions of departments such as "collections information" and "digital and information technology" are intended to represent the nature of the work done by the participant. These participant descriptions are intended to situate the analysis of the interviews that follows.

*Anonymisation*

All data have been anonymised for this paper. A high degree of confidentiality was essential for participants to feel comfortable discussing critical cataloguing as this subject involves closely-held personal opinions and beliefs as well as potential criticism of the participants' places of employment. References to specific participants in the rest of this paper is done through use of a Participant ID number.

## RQ 1: Challenges experienced by museum-based critical cataloguers

### *Challenge 1: Unsupportive work environments*

The challenge of working in unsupportive environments was frequently raised: when asked about institutional responses to critical cataloguing work, participants described mixed reactions from their colleagues and institutional leadership. Ten participants described reactions from colleagues that were fairly split between positive and negative responses: four described positive reactions, four described negative reactions, and two described a mix of both. A common factor for the six who described experiencing negative responses was the belief that colleagues did not see value in critical cataloguing work. A second recurring factor was a described hostility on the part of the colleague to a perceived undermining of authority being committed by the participant or their critical cataloguing initiative; one participant described a type of colleague "who doesn't want to be told that they've been doing something the wrong way or that they're being potentially offensive to groups of people" (P01) while a second empathised "it's very common to feel really proprietary about the works that you're responsible for" (P07). A final recurring factor was lack of capacity resulting in a reluctance to get involved. For example, one participant described this as the reason that their colleagues refrained from active participation in their institution's critical cataloguing staff discussion group:

> "I think one thing that is an issue or like intimidates colleagues maybe, is the fact that I think if they put something forward they always see it as like something they have to edit and change afterwards. So creating work for themselves rather than being, like, 'this will be a useful example for discussion and I get to the cataloguing when I get to it'." – P15

The majority of participants who discussed leadership responses to critical cataloguing work described experiencing negativity: seven of the ten participants who spoke about this directly described unsupportive leadership teams, two described an entirely positive leadership team, two described leadership that was sometimes positive and sometimes negative, and one described a situation where a change in leadership led to a change from negative to positive leadership response. For the two participants who described their leadership teams as having been sometimes positive and sometimes negative, the moments in which support was given or withheld differed. In the first case, the participant described leadership that was supportive of identifying non-white individuals in their records but did not want the white individuals in their records identified as such, revealing an institutional culture of white fragility (DiAngelo, 2019). In the second case, the institution was supportive of diversity, equity, and inclusion work more generally and had recently required manager-level staff to undertake anti-racism training; however, there was still a lack of top-down support for prioritising critical cataloguing work that could help transform learnings from such training courses into actions.

These two cases also illustrate the two types of negative responses described by the seven participants who talked about unsupportive leadership teams: lack of understanding or belief in the value of critical cataloguing, manifesting in explicit actions preventing the work from taking place, and lack of prioritisation of critical cataloguing, manifesting as subtle but pervasive undermining. In these latter situations, while critical cataloguing work was not experiencing the kind of push-back given by actively resistance leadership, institutional culture contributed to creating a challenging environment for participants to advance their critical cataloguing initiatives.

### *Challenge 2: Lack of knowledge about best practices*

Uncertainties about what to do were discussed by ten participants. One described this as common, stating that "there are plenty of people in the sector actually who probably, like me, want to enable change and support and facilitate change but either don't know how or don't have capacity or don't even know where to start and what

they could be doing" (P11). Three others raised the issue of lack of guidance specific to the museum field, saying that "it's a lot harder to find museum work" (P04) than for related disciplines. These participants described using guidance developed for related disciplines such as libraries and archives to inform practice in their museum contexts.

The lack of domain-specific resources was also discussed by four participants who spoke about the need for term lists that could be used to identify catalogue records in need of review. These participants identified three areas of complexity regarding domain-specific resources. First is the complication of working with historical language as described by Interviewee P01: "most people had kind of 20th century or 21st even century style term lists and the language that people were using in like the 19th, the 18th century, it was much more coded". Second is the complication of language being specific to place: one participant explained how they grew up in a European country with one parent from North America and were now working in a British institution, and that across these three locales there are terms that would be considered offensive in one but not others. Therefore, domain-specific resources could vary depending on a museum's location. Third is uncertainty about deciding who has authority to develop a resource: all four participants spoke about their reservations regarding the process of developing glossaries, illuminating that the lack of domain-specific guidance in regards to best practice approaches also results in additional hurdles regarding the lack of domain-specific resources.

### *Challenge 3: Lack of agency*

Seven participants discussed challenges regarding their ability to make and carry out decisions, namely not having—or not knowing if they had—the agency to make and enforce decisions, especially when it required the involvement of colleagues. For one participant whose critical cataloguing project is in early stages, this murkiness hangs over the entire initiative:

> "I think right now it's a little unclear what, how much power we have or how much sway we have… So it is a kind of interesting task because we've been asked to do this, but there's never been a guarantee that what we suggest will be implemented or agreed upon." – P24

Even though Interviewee P24 is part of a formal staff working group put in place by institutional leadership, they did not feel confident that their group's work would necessarily lead to action.

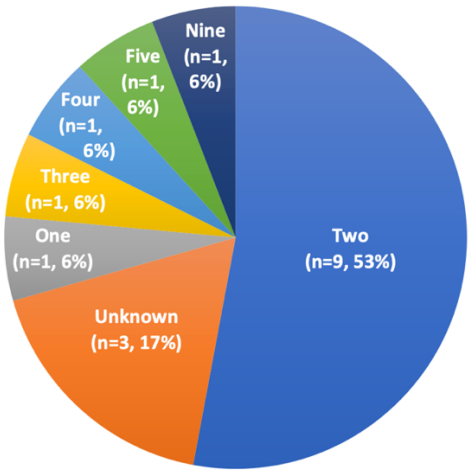
This tension between authority and responsibility was also discussed by the other six participants. Four spoke about this challenge as needing considerable time to work through. Two identified this as a primary reason that initiatives to develop content warnings for their online collections been halted: lack of consensus around who had the authority to decide and who was responsible for implementing and maintaining it resulted in nothing happening at all. Two others described themselves as currently engaged in processes of determining answers to these questions; while this challenge had not halted their critical cataloguing projects, discussions were lengthy and ongoing. One of these participants spoke about this challenge as "impeding our ability to do the actual work currently, but we know that that's just something that we have to work through, it's just going to take time" (P04), indicating that they have hope in the tension resolving.

### *Challenge 4: Lack of resourcing and capacity*

The most frequently mentioned challenge area was lack of resourcing and capacity: seventeen participants spoke about having too much work and not enough time to do it, or not enough hands for the workload, while also trying to work on critical cataloguing initiatives. Furthermore, one consultant said they believed this be the primary barrier to critical cataloguing work in museums.

Participants described working in small teams on critical cataloguing projects. While formal working groups could include over 20 members, the bottom-up organisation of work tended to involve only a handful of colleagues (see Figure 1). Participants described their working situations in terms such as "overstretched" (P15), "overworked" (P06, P18), "short-staffed" (P12) and "under-resourced" (P02). Six participants explained how this challenge means that they struggle to find adequate time for critical cataloguing. Three additional participants spoke about requiring additional resourcing—namely funding and staff—in order to for their institution be able to really engage in critical cataloguing.

*Figure 1: Number of members in critical cataloguing teams described by the 17 museum-based participants*




Participants also discussed how high rates of turnover impacted critical cataloguing work. One described how a period of high turnover meant that each time there was a change in the leadership team at their museum they had to start the approval process over again:

> "Things that kind of have been issues is, there's been a lot of turnover at the museum. And so it's the re-explaining of the goals of the team and what we're trying to accomplish and then trying to work in with new museum goals based on the fact that we had a change in our executive staff." – P04

Others described how losing key drivers resulted in projects stalling out or losing momentum. With such small teams, the loss of a single staff member could mean losing half of the critical cataloguing team. Three participants described situations where the loss of somebody doing critical cataloguing work meant that projects had barely progressed since that individual's departure. Interviewee P12 spoke about how staff turnover exacerbated capacity-related challenges in two ways: first by resulting in the department or institution being increasingly overburdened until a replacement was onboarded, and second by resulting in a loss of project momentum when the departing staff was also a key driver for the critical cataloguing initiative. Therefore, it's not just a case of not having enough hands, but not having enough active participants as well.

### *Challenge 5: Collections management systems don't meet requirements*

Participants discussed a laundry list of issues they had with their collections management system (CMS) in relation to critical cataloguing work. The most frequently mentioned problem area was lack of system support for retaining institutional histories, discussed explicitly by six participants who also spoke about the consequences of this: interviewees and their colleagues were reluctant to update language if it came at the cost of no longer having a record of the current version of the field. This is a risk when the CMS only allows for a single version of a field, meaning that updating the content requires overwriting the existing version with no way to preserve the field's history.

The second most frequently mentioned issue area was lack of system support for searching for and working with data in desired ways: this was discussed explicitly by five participants. Three described exporting data to use other tools because this was the only way to do what they wanted to do. Another described finding it difficult to be confident that they were seeing everything they were looking for in their CMS because they did not know how to get a clear high-level view. The fifth of these participants focused on issues they had with not being able to perform edits on multiple records simultaneously, creating a laborious cataloguing workflow. As a result, finding and editing data—and thus engaging in critical cataloguing—also became more laborious than, arguably, it may be if system support for this need was present.

The final problem area was lack of system support for leveraging controlled vocabularies. Three participants identified issues with the contents of the controlled vocabularies available in the out-of-the-box (OOTB) implementation of their CMS, the capabilities of the controlled vocabulary construction module in their CMS, and the search support for leveraging controlled vocabularies on their online collection site. In the first

case, the participant described adding ethnicity terms into the structure of the existing controlled vocabularies available to them OOTB by entering them as artistic styles or periods because this was the only way they had identified as possible. In the second case, the participant described building their own controlled vocabulary but stated that their CMS did not allow them to identify two terms as alternatives to each other without also classifying one as preferred and the other as non-preferred: as such, this did not fully meet the participant's requirements. In the final case, the participant's online collection website did not support search across terms that had been labelled as non-preferred in their CMS; as a result of the limitations to search that resulted from this, the participant discussed a similar hesitancy to update language as other participants did when their CMS's did not retain institutional histories.

### *Challenge 6: Museum data is difficult to work with*

In addition to challenges with technology, participants described difficulties of working with museum data due to the size and diversity of datasets, as well as the nature of museum data as a site where contemporary users encounter historical concepts and language. One set of six participants spoke about the first problem area, a second set of six spoke about the second, and one discussed grappling with both of these issues.

Amongst the first set of participants, issues posed by dataset size and diversity were tangled with concerns about inconsistencies, errors, and omissions: participants did not discuss only a single one of these concerns but saw how one aspect contributed to another. For example, four participants detailed how their collections data did not contain the information about maker demographics that they were interested in, and that in some cases where that had been included, the information wasn't always correct. For one, this led to an interest in what those omissions revealed about their institution's priorities; the second focused on how absence of information made engaging in critical cataloguing more difficult, explaining that "the data that we currently have doesn't help because we don't capture a lot of the data that we might need in order to do some of the bias remediation work" (P04).

The seven participants who spoke about challenging data contexts raised the topic in three types of situations: when explaining their reasoning for critical cataloguing, when justifying why the language in a record could not be changed, and when discussing their belief that individuals in catalogue records should be described using language that those persons used to describe themselves in their lifetimes. When discussing reasonings for critical cataloguing, two participants discussed changes in language that happen over time, noting that "there are a lot of offensive terms that have historically been used in documents that have shifted in meaning or that were seen as non-problematic at one point, but now are things that we don't use" (P12) and that people are "looking at files now through a modern lens" (P08). Critical cataloguing is thus a way to consider contemporary encounters with historical language. This concept of contemporary versus historical language and encounters also extends to descriptions of makers—in particular historic persons—in catalogue records. Interviewee P24 described this challenge as "there's always this balance between respecting the person's lived identity and experience, and then also trying to figure out how to contextualize it in a modern context". In these cases, critical cataloguers are trying to negotiate the historical contexts in which the people in their records lived, and the contemporary understanding of the world that museum data users are bringing to their searches.

### *Challenge 7: Critical cataloguing is time-intensive work*

Compounding the above challenges is the time-intensive nature of critical cataloguing work, as detailed by all participants in their descriptions of their work and named directly by twelve participants. A lack of domain guidelines means that staff who want to engage in critical cataloguing often have to begin their processes with best practice research, working to locate applicable resources and figure out how to adapt them to their contexts. Critical cataloguing requires solutions that are adapted to the needs of the domain and institution, and sometimes to the level of collection and even record, meaning that existing solutions can rarely be directly applied: as stated by Interviewee P07, "there are frameworks that we can adopt from for people, but every system has to be unique and responsive to the needs of its institution". Six participants spoke about how the size and diversity of their collections data in combination with manual processes for identifying and editing records meant that critical cataloguing required significant amounts of focused staff time. Lastly, critical cataloguing is time-intensive because it is iterative, continual, and requires ongoing commitment. Therefore, in addition to requiring

dedicated time at present, critical cataloguing requires dedicated attention as part of ongoing cataloguing practice—a challenge for those who already find themselves lacking capacity, resourcing, and assured agency to carry out the work.

Although there may appear to be similarities between this challenge and challenge 4 (lack of resourcing and capacity), the time-intensive nature of critical cataloguing work is discussed separately because of the locus of the challenge as discussed by participants. Participants named issues related to challenge 4 as being related to working conditions, and thus there was the potential to alleviate them if changes were made to work environments such as hiring additional staff and reducing turnover. Issues related to this challenge, however, are inherent to the nature of critical cataloguing work itself: even if changes were made to address issues of resourcing and capacity, critical cataloguing work remains a time-intensive area of practice.

### *Situating challenges in the literature*

Heal, Perera, Kamposiori, and Luke and Mizota all discussed barriers identified by their research participants in doing critical cataloguing, decolonisation, and activist work in cultural heritage institutions (Heal, 2019; Perera, 2022; Kamposiori, 2023; Luke and Mizota, 2024). In line with the findings of this research, all four of these papers discussed challenges related to resourcing and capacity as being some of the most difficult barriers for engaging in critical cataloguing, decolonisation, and activist work. First, Luke and Mizota reported that the majority of their participants described initiatives that were led by individuals; this is similar to the present study, in which the most common size of team for a critical cataloguing project reported was two: the participant and one other (Luke and Mizota, 2024). They also reported that 14 (73%) of the institutions represented by their respondents experienced challenges related to time/capacity, support/resources, staffing, and funding: this was by far the most frequently mentioned area of difficulty encountered by their respondents (Luke and Mizota, 2024). Likewise, when Perera discussed responses to the Likert-scale survey question "How challenging do you find the following experiences when engaging in inclusive work and/or initiatives?", they reported that the most frequently identified challenge was "Limited personnel available for description work at workplace", with 86% of respondents stating that this was a challenge (Perera, 2022). Kamposiori too found that "it was often a combination of limited time, resources and staff that constituted the main challenge in progressing related activities and discussions" for their respondents (Kamposiori, 2023, p. 22). When discussing obstacles to activist work, Heal also detailed lack of resources along with staff perception that activism is "a difficult area of work and one in which museum workers lack the necessary skills" (Heal, 2019). The lack of confidence that is hinted at here may also be reflected in Perera's report that 74% of their respondents named "Lack of formal training on inclusive description" to be a barrier to their work, as well as this study's findings where interview participants identified lack of knowledge about best practices as an obstacle (Perera, 2022). In all of these contexts, staff not feeling like they have the tools they need to engage in the work emerged as a challenge.

Two other challenge areas found in this study that were raised by Perera's respondents were difficulties working with staff and leadership, and lack of agency for making decisions about and carrying out critical cataloguing work. Perera reported that 61% of their respondents named "Workplace politics or bureaucracies" as a challenge, and 66% named "Limited to no agency for decision-making related to inclusive description work and/or initiatives" as a challenge (Perera, 2022). As Perera's research method was a survey in which a preset list of options was given to respondents to rank, it was not possible for participants to suggest barriers that they experienced but that had not been preset by the survey design. This was not the case for the present research nor for Luke and Mizota, who also conducted semi-structured interviews. They reported eight additional types of barriers that were mentioned by at least one respondent, the most notable of which in the context of this research was "Technical challenges": three institutions noted experiencing technical challenges, although this was not expanded upon in (Luke and Mizota, 2024). The commonalities in response between existing literature and this research reinforce the widespread nature of shared challenges, while the detail provided here introduces depth to the understanding of the nature of these challenges, how they manifest, and their impact on critical cataloguing initiatives in museums.

## RQ 2: Strategies used by museum-based critical cataloguers

### *Strategy 1: Know your values*

The first strategy discussed by participants was to know one's values so that work is driven by those principles. Seven participants mentioned defining values as either a requirement for or component of critical cataloguing work. Three stressed that it was essential to define one's values and ethical framework before engaging in critical cataloguing as this connects actions to purpose. For example, Interviewee P03 asserted that "there's no easy answers, you have to know your values before you dive into any of this, and no one's gonna do that work for you". Articulating values can also help to create a shared vocabulary with which to speak about critical cataloguing to others who are curious about such work. As such, it is a key tactic for individuals thinking about engaging in critical cataloguing for the first time as well as for those looking to communicate to others the reasoning behind critical cataloguing initiatives already underway.

### *Strategy 2: Identify and act where you hold power*

The second strategy described was identifying where one has power in one's institution and taking action within that area: eleven participants described this as a key early step for getting critical cataloguing initiatives off the ground. Six described this method as the way they started critical cataloguing work when they didn't feel they otherwise had power. These participants described asking themselves, and sometimes their colleagues, two sets of questions: questions to identify where they could act—"what do you manage?", "what do you have control over?", "where do you have autonomy?"—and questions to identify what actions they could take—"what can you make?", "what can you do?". Based on the answers, they then took action within the determined purview. Five other participants described this method as the way to start on critical cataloguing work when they recognised themselves as holding power. Three identified that their positions enabled them to influence critical cataloguing work within their departments, while the fourth saw themselves as being "probably the person who's got the most obvious job role that is able to try to drive this forward in a kind of cross institutional way" (P02). In this final case, the participant identified that they could support critical cataloguing in their museum by creating bridges across institutional silos, as opposed to focusing on work within a single department.

### *Strategy 3: Foster an internal network of co-conspirators*

The third strategy discussed by participants was to identify and collaborate with colleagues who shared an interest in critical cataloguing, and then to grow that network alongside their initiatives. Four participants spoke about working with like-minded colleagues as well as endeavouring to bring more colleagues into the work: two described the importance of the immediate relationship they had with their teammate or manager in starting critical cataloguing work, while two others described how cross-departmental conversations led to progress in broader initiatives. These four participants—along with an additional five—detailed five strategies for encouraging colleagues to participate in critical cataloguing: *communicate how critical cataloguing helps you work together towards a common goal*, *make colleagues feel heard and valued*, *show that the problem is real*, *make barriers to participation low*, and *celebrate all wins*. These methods all focus on creating a welcoming, collaborative atmosphere.

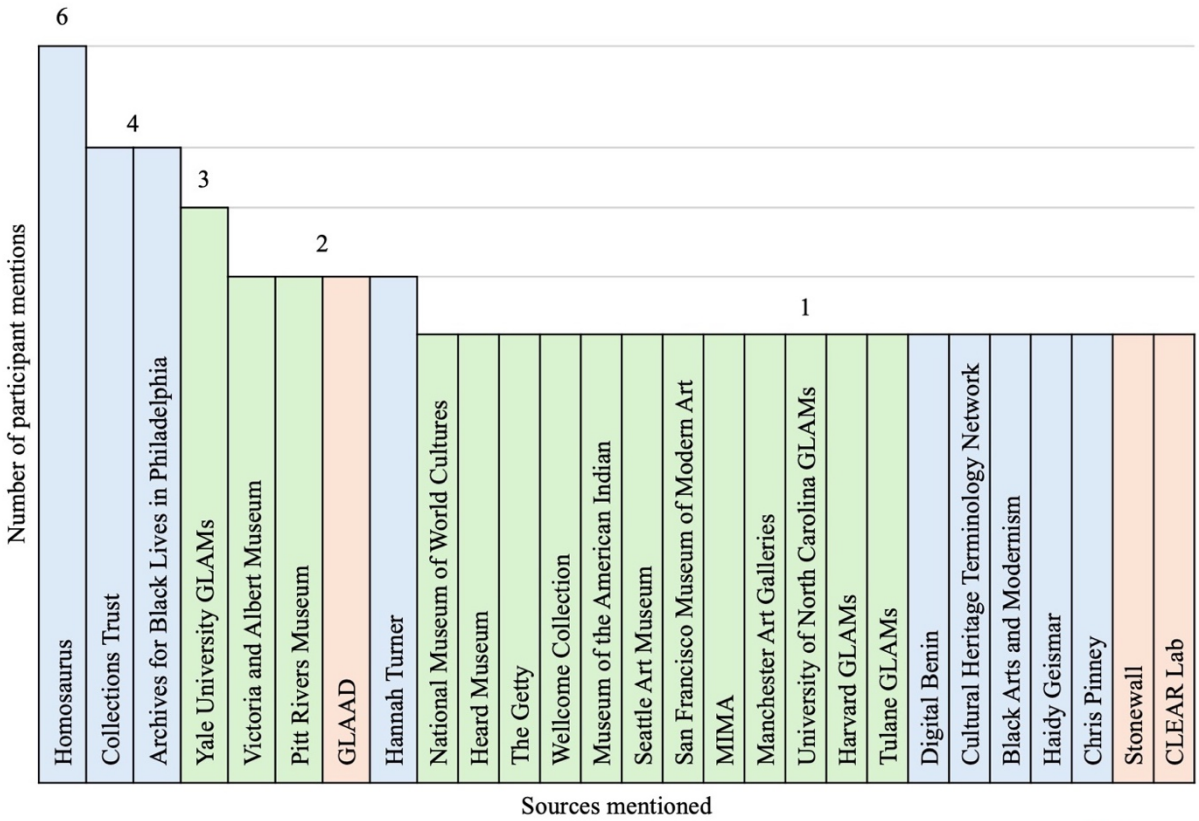
Framing critical cataloguing as work towards a common goal was the most frequently discussed tactic, spoken about by six participants. Participants identified three common goals: doing "the right thing", making collections findable and usable, and keeping up with domain best practice. Critical cataloguing then became the way of working towards those shared goals. Four participants emphasized the importance of ensuring that colleagues felt heard and valued when discussing critical cataloguing issues. Two spoke about starting from the position that people usually want to do the right thing but may hold different beliefs about what that means or looks like. The other two, echoing this sentiment, said that ongoing conversations of various levels of formality—"just planting little seeds or making, like, let's go to coffee and talk about it" (P13)—were key for getting people onboard. Two participants noted that showing colleagues examples from records was useful for evidencing that the issues they wanted to tackle through critical cataloguing were real for their institution: colleagues may not be aware of the issues present in their catalogues, so this reveals the reality of the situation. Two others spoke about lowering barriers for colleagues to engage in critical cataloguing. One described doing

this by setting up the project so that all work occurred during meetings, while the second discussed supporting different levels of involvement so that a greater number of people could get involved. Lastly, two participants discussed the importance of recognizing and celebrating all successes as a way to maintain motivation and engagement. This applied to sustaining their own involvement as well as that of others. It made it possible to see progress that was occurring when tackling a large, complicated, and multi-faceted problem area.

### *Strategy 4: Learn from others*

The fourth strategy discussed by participants was to learn from others. Participants mentioned learning from 27 different sources (Figure 2). They discussed obtaining resources from a range of sources: three mentioned getting vocabulary resources from other cultural heritage institutions, while three others spoke about looking more broadly. Interviewee P12 explained that "there are a lot of different groups that have terminology guidance out there that is very good and that is their expertise… we don't really have as much time as these people who are experts, so we do draw on their expertise". For a participant searching for demographic terms, using community-developed sources was important because "I have felt very strongly that to the extent that we can, I want to rely on other sources and I want to rely on sources from the communities that are being described" (P07). Looking externally for resources was not just a way to lighten the workload but came from the belief that the language the institution used to describe people should be language identified by those parties as their preferred terminology.

*Figure 2: Institutions, organisations, and people cited by participants*




Legend: GLAM institutions (n=15): green | GLAM networks, organisations, and researchers (n=9): blue | Non-GLAM organisations (n=3): orange

### *Strategy 5: Make the most of advantageous moments*

The fourth strategy discussed by participants was to act when moments presented opportunities to invest in critical cataloguing work. Participants discussed three kinds of inciting incidents, summarised in Table I: *moments of cultural consciousness*, *changes to work environments*, and *implementations of new technologies*.

*Table I: Inciting moments of critical cataloguing work, ordered by earliest start date*

| Participant ID(s) | Institution | Starting year(s) | Moment of cultural consciousness | Change to work environment | Implementation of new technology |
|---|---|---|---|---|---|
| P16 | Museum | 2004-06 | | | New CMS. |
| P02 | Museum | 2007-09 | | | First online collection. |
| | | 2020 | BLM protests. | | New online collection. |
| P08, P09, | Museum | 2008 | | Grant funding. | |
| P12, P15 | | 2020 | BLM protests. | | New online collection. |
| P06, P07 | Museum | 2014 | BLM protests. | | |
| | | 2020 | BLM protests. | | |
| P01 | Museum | 2016 | USA election | | |
| P03 | Museum | 2017 | | Grant funding. | |
| P03 | Museum | 2018 | | Grant funding. | |
| P13 | Museum | 2020 | BLM protests. | COVID-19 remote work. | New CMS. |
| P19, P20 | Museum | 2020 | BLM protests. | | |
| P21 | Museum | 2020 | BLM protests. | | |
| P22 | Museum | 2020 | BLM protests. | | |
| P23 | Museum | 2020 | BLM protests. | | |
| P01 | University | 2020 | | | New online collection. |
| P10 | Consultant | 2020 | BLM protests. | | |
| P22 | Consultant | 2020 | BLM protests. | COVID-19 furlough. | |
| P18 | Museum | 2020-22 | | Grant funding. | |
| P23 | University | 2020-22 | | Grant funding. | |
| P04 | Museum | 2022 | BLM protests. | | |
| P11 | Museum | 2022 | BLM protests. | COVID-19 remote work. | New CMS; new online collection. |
| P17 | Consultant | 2022 | BLM protests. | | |
| P14 | Museum | 2022 | | | First CMS. |

The majority of participants discussed moments of sociopolitical change as influencing factors for the development of critical cataloguing projects. While many cited the Black Lives Matter (BLM) protests that emerged starting summer 2020, earlier moments such as the 2014 BLM protests in response to the fatal shooting of Michael Brown and the 2016 US presidential election were also mentioned. The summer of 2020 also coincided with changes to work environments as the COVID-19 pandemic led to temporary closures, remote work, and furloughs. Working from home meant that it was possible to focus on areas of museum work such as cataloguing that did not require physical access to the collections, and the sociopolitical environment of cultural consciousness introduced a lens of social justice to how museum professionals were thinking about engaging with that work. Another change to work environments that participants noted as presenting opportunities for critical cataloguing was the acquisition of project-specific grant funding to support critical cataloguing tasks; for example, a grant made it possible for Interviewee P18 to take on a new project with explicit critical cataloguing goals.

The final moment of opportunity discussed by participants was the implementation of new technical systems such as a CMS or online collection, as these were times when data needed to be reviewed in order to be migrated or published. Instances of critical cataloguing connected to this need account for some of the earliest critical cataloguing work described by participants. One participant described how they were able to use the development of a new online collection to launch a critical cataloguing project:

> "One of the requirements of the collection online project was, that we added to the list that would be new and different to what we've done before in our old platform, was the idea of disclaimers and trigger warnings because it was something that I was becoming increasingly aware of as necessary." – P11

For this participant, their interest in critical cataloguing had begun long before this moment: they had been conscious of the colonialist biasses of museums for many years and their interest in intervening in this space through their work in digital museum practice grew during the COVID-19 lockdown period and 2020 BLM protests. The implementation of a new online collection was the shift in their immediate work environment that then made it possible for them to introduce critical cataloguing into active practice.

### *Strategy 6: Don't delay unnecessarily*

Lastly, five participants stressed the importance of not delaying in the hopes of solutions or resources becoming available. They raised the importance of identifying that action can happen in the present with the tools that are immediately available. Best practice approaches for critical cataloguing in museums are still evolving, and one participant spoke about the importance of not waiting to have all of the answers before starting as methods will evolve as the work is underway. A second asserted that the ideal level of resourcing is not likely to occur with any immediacy and thus should not be made into an insurmountable barrier. Lastly, three spoke about the importance of not waiting on other people to start taking actions within one's area of control. For one participant, this was driven in part by the knowledge that the leadership at their institution was not supportive of critical cataloguing; therefore, they determined that it was more important to act than wait for permission that was unlikely to be granted. The other participants spoke about this in relation to their colleagues, stating that they were working in the areas that they could while also hoping that the seeds being planted would mean that more of their colleagues would be interested in taking part in the future.

> "You want to bring people into this work and you want people to want to do it and you want people to do it. But if people aren't doing it, you shouldn't wait to collaborate with the collaboration that's never going to come. You have to do something because it isn't, what is the point of saying 'we want to be more equitable, we want to do better' and not actually doing anything?" – P21

### *Situating strategies in the literature*

Heal was the only author identified to have discussed their respondents' strategies for success (Heal, 2019).[3] In response to the open-ended interview question "What are the critical factors for success?", they describe two types of responses: those about values and integrity, and those about creating institutional buy-in (Heal, 2019). These align with two strategies discussed by participants in these interviews: strategy 1 (know your values) and strategy 3 (foster an internal network of co-conspirators). The four additional strategies that emerged from this research, as well as the descriptions of how to put these strategies into action, are not present in Heal's discussion. However, aspects of these strategies can be seen in other literature on critical cataloguing work in museums. For example, strategy 5 (make the most of advantageous moments) can be seen in articles describing critical cataloguing work in three institutions (Woodward and Kerr, 2023; Carreau and Gunn, 2024; Christophe *et al.*, 2024). One of these three also discussed strategy 6 (don't delay unnecessarily), saying that "many may fear even beginning such work in case they get any aspect of it 'wrong'" and arguing that what is important is to try (Woodward and Kerr, 2023). Lastly, strategy 4 (learn from others) was visible through the reuse of shared resources (Adams, 2024; Campbell and Smith, 2024; Christophe *et al.,* 2024; Davies and Dillon, 2022). Strategy 2 (identify and act where you hold power) was not present in existing literature.

## Discussion

### *Challenges and strategies*

The challenges and strategies described above fundamentally touch on existential issues for museums: they about wrestling with institutional histories and how those legacies show up in contemporary work practices, priorities, systems, and records. Several participants recognised this and spoke about "hitting against those invisible kind of structures that you don't know how to dismantle" (P01) and how critical cataloguing ultimately means institutional change across museums because "critical cataloguing is a way to look at bias in your collection and in your data and in the people who are doing it, because I don't think you can separate the data from the production of the data" (P21). Participants connected the challenges they encountered to this wider

view. Interviewee P19 discussed how “it's really hard to tear down a system when your whole job is to uphold the system, and I would say that that's something that we're trying to grapple with”, identifying a tension. Interviewee P01 also spoke about a similar tension through identifying what work they were able to accomplish and what hit up against those “invisible kind of structures”: “I mean, it's easy enough for me to go and change someone's primary name—I mean, sometimes it's easy enough—but dismantling the structure that put that there in the first place is a whole other thing”. Ultimately, while participants focused on the kinds of challenges that they experienced most acutely, these were rarely discussed in isolation from other elements as they all contribute to the larger shared challenge of grappling with institutional histories and the legacies of those priorities and practices as they continue to be visible today.

The strategies that participants discussed reflect the ways in which critical cataloguers are finding ways to do that grappling. They include methods of developing community, such as learning from others and fostering an internal network of co-conspirators. They also include methods of subversion of institutional structures and cultures, such as identifying and acting where you hold power, making the most of advantageous moments, and not delaying unnecessarily. Together, these strategies show ways of working to change institutional norms while also not waiting on this change to take place before beginning critical cataloguing projects. The first, and arguably most foundational strategy, to know your values, contributes to both of these areas: belief in those values is why subversion is determined to be necessary, and is a set of core principles around which community can be grown.

### *Limitations*

The research detailed in this paper was conducted solely by the author. This introduces the potential for subjective interpretive bias as it describes a view of the data from the perspective of a single individual. In order to support the validity and reliability of the research findings, several mitigation strategies were followed. First, a priori code development was reviewed by the author’s doctoral supervisory team, and one member of this team was also consulted in the development of inductive codes, categories, and themes. Second, the author met for regular debriefing sessions with this supervisory team member to discuss process and progress. Third, the author developed a codebook containing codes, definitions, and examples, and used this codebook during the coding process. Lastly, the author engaged in analytic memoing to support a transparent and reflexive practice, as well as to create an audit trail of analytic decisions. These techniques help to mitigate the risks of qualitative and single-researcher studies (Guest *et al.*, 2012, pp. 79-106; Saldaña, 2021, pp. 57-71; Shenton, 2004).

This research examines the experiences of critical cataloguers working in and with museums in English-speaking UK, USA, and Canada. This scope is based on the locations of the interview participants along with literature discovered in this area, which relies on the use of the term *critical cataloguin*g as a descriptor. The scope of this research does not intend to disregard critical cataloguing work taking place in museums globally and which may not use this label, but instead represents the range of information and sources that the author was able to engage with using the methods described above. The experiences, challenges, and strategies of museum-based critical cataloguers globally is an area for comparison in future research.

## Conclusion

This research has identified seven types of challenges being faced by critical cataloguers in museums, as well as six types of strategies that they use to develop and advance critical cataloguing work. As critical interventions into museum practice, these challenges and strategies are not just about the work itself as it can be seen in collections data, but also the cultural context in which museum documentation practice sits. Critical cataloguing practitioners are not attempting to just change metadata, but to change the ways in which museums show up in their relationships with staff, visitors, and community members, with collections information being the site of encounter. As such, the challenges which critical cataloguers experience are about difficulties in making these changes, and the strategies they are using focus on ways to make such shifts possible. By working collaboratively where possible, and subversively where needed, critical cataloguers are finding ways to expose, examine, and challenge the power structures that remain present in museum documentation today.

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[1] These are listservs managed by the Critical Digital Humanities Initiative, the University of Victoria Digital Humanities Summer School, the Museum Computer Group, the Museum Computer Network, Linked Art, and Collections as Data, the American Alliance of Museum's Collection Stewardship membership community, and the Worlding Public Cultures research group email list.

[2] Although the term *represented* is used here to describe the relationship between the participant and their workplace, all interviewees speak for themselves and not as representatives of the museums they work for or discuss.

[3] Although Luke and Mizota included the question "How are you able to navigate these challenges and still produce meaningful work?", they do not include responses in their discussion (Luke and Mizota, 2024).

## Appendix A

### *Data availability*

The interview data generated and analysed in this research are not publicly available due to participant confidentiality agreements. Anonymised excerpts appear in the publications detailing this study. Additional information may be available from the author upon request and subject to approval from the University of Oxford Medical Sciences Interdivisional Research Ethics Committee.

### *Semi-structure interview guiding questions*

1. How and why did you get involved in critical cataloguing work?
2. What is the name given to the critical cataloguing project/initiative at your institution?
3. When and how did the project/initiative come into being?
4. Are there similar projects, perhaps in other institutions, that inspired you or the project/initiative? Please tell me about them.
5. What is the work that is being done as part of this project/initiative?
6. What is the name given to the type of content you are auditing for and how do you define it?
7. Broadly speaking, what are the kinds of issues that you have encountered or expect to encounter?
8. Other than yourself, who is involved in the project/initiative?
9. What are the methods that are used to do this work?
10. How are the changes resulting from the work documented?
11. What are the goals of the project/initiative?
12. How are you measuring success?
13. What would you say this project/initiative has achieved thus far?
14. Who do you hope benefits from this project/initiative, and in what ways?
15. What are your blue-sky dreams for this project/initiative, either in its current or a future form?