**Instructions for Annotating Gendered Language with Brat**

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Data Source: ArchiveSpace (archives.collections.ed.ac.uk)

Data Provider: Centre for Research Collections, University of Edinburgh

1. In this exercise we ask you to label occurrences of gendered language in descriptions extracted from [ArchivesSpace](https://archives.collections.ed.ac.uk/), the Centre for Research Collections’ online archival catalog. The descriptions have been extracted from four metadata fields: Title, Scope and Contents, Biographical / Historical, and Processing Information.
2. Open the following link to the [brat rapid annotation tool](https://brat.nlplab.org/) in Google Chrome or Safari: [REDACTED]
3. Using your mouse, click the “OK” button in the first pop-up window and then, in the next pop-up window, under [REDACTED], click the folder named [REDACTED].
4. Click the “OK” button.
5. Click the document in which to begin making annotations:
   1. If you have not yet made any annotations, double click the first folder and then click the first file in the list to begin annotating.
   2. If you have made annotations already, click the file listed directly after your last annotated file.

*Please note that brat won’t remember what file you stopped on, so I recommend writing down the name of the file you’re on when you exit brat!*

1. Click the “OK” button.
2. Hover over the blue bar at the top of the webpage.
3. Click the “Login” button.
4. Type your login details into the pop-up window: [REDACTED]
5. Click the “OK” button.
6. As you read and label the archival metadata descriptions displayed on the screen, **including** text that quotes from source material, meaning text surrounded in quotation marks that reproduces something written in a letter, manuscript, or other text-based record from an archival collection.

***If you are unsure about an annotation, please make a note the file name and your question*** *so that we can discuss it and decide on the way to annotate that sort of language moving forward!*

1. Please note that **Gendered-Pronouns**, **Gendered-Roles**, and **Occupations** have been pre-annotated.

If any of these three categories of language have been annotated **incorrectly**, please correct them by clicking on the annotation label, deleting it, and making the correct annotation.

If any of these three categories of language have been **missed** in the pre-annotation process, please annotate them yourself.

1. Read the archival metadata descriptions displayed and while reading:
   1. Use your mouse to highlight a selection of text or click on a word that uses gendered language according to the schema in the table on the next page.
   2. Using the keyboard shortcuts (see the table) or your mouse, select the type of gendered language you’ve identified.

*Please select* ***the most specific label possible*** *(listed as i, ii, iii, or iv)! Please only select I. Person-Name, II. Linguistic or III. Contextual if you do not feel their subcategories are suitable to the gendered language you would like to annotate.*

* 1. If you select a subcategory of Contextual gendered language, please write a brief note explaining what you’ve annotated as gendered in the “Notes” section of the “New/Edit Annotation” pop-up window.
  2. If you used your mouse to open the pop-up window, press the Enter/Return key or the “OK” button to make the annotation.
  3. You may make overlapping annotations, meaning a single word or phrase may have multiple gendered language annotations.
  4. Please annotate all instances of a particular type of gendered language used for a specific person or people in the text.
  5. Please note that the labels to annotate with as defined below are intended to guide your interpretation of the text through a **contemporary**lens (not a historical lens).

*The examples provided in the schema below are highlighted according to the words, phrases or sentences that should be highlighted or clicked in brat. If in doubt about how much to annotate, please annotate more words rather than less!*

1. **Person-Name**: the name of a person including any pre-nominal titles they have (i.e., Professor, Mrs., Sir)

**NOTE 1:**Please annotate every instance of a name in brat only (do not use a spreadsheet anymore). This means that each person may have multiple person-name labels annotating the same form of their name or different forms of their name.

**NOTE 2:**Use the pronouns and roles that occur **within the descriptive field in which the name appears** (either “Title,” “Scope and Contents,” “Biographical / Historical,” or “Processing Information”) to determine whether the annotation label should be Woman, Man, Nonbinary, or Unknown.  Please do not use the occupation, name, or other information that implies a gender to determine the annotation label; only use explicit terms such as gender-marking pronouns (him, her, he, she, himself, herself, etc.) and gender-marking roles (mother, father, daughter, wife, husband, son, Mrs, Ms, Mr, etc.).

* 1. **Woman**: the pronouns (i.e., she, her) or roles (i.e., mother, wife, daughter, grandmother, Mrs., Ms., Queen, Lady, Baroness) or use of term nee \_\_\_ indicating a maiden name **within the descriptive field in which the name appears (either “Title,” “Scope and Contents,” “Biographical / Historical,” or “Processing Information”)** of the named person suggest they are a woman

Example: Mrs. Jane Bennet went to Huntsford.

* 1. **Men**: the pronouns, roles, or titles of the named person suggest they are a man

Example: Conrad Hal Waddington lived in Edinburgh and he published scientific papers.

* 1. **Nonbinary**: the pronouns or roles of the named person **within the descriptive field in which this instance of the name appears (either “Title,” “Scope and Contents,” “Biographical / Historical,” or “Processing Information”)** suggest they are nonbinary

*Note: a preliminary search of the text returned no results for exclusively nonbinary pronouns such as Mx, so most likely any non-binary person would be indicated with “they”); if the gender of a person is named and it’s not a woman or man,* ***please note this gender in the “Notes” section of the annotation pop-up window***

Example: Francis McDonald went to the University of Edinburgh where they studied law.

* 1. **Unknown**: there are no pronouns or roles for the named person **within the descriptive field in which this instance of the name appears (either “Title,” “Scope and Contents,” “Biographical / Historical,” or “Processing Information”)** that suggest their gender identity

Example: Jo McMahon visited Edinburgh in 1900.

1. **Linguistic:** gender marked in the way a sentence references a person or people, assigning them a specific gender that does not account for all genders possible for that person or group of people

***Keyboard shortcut: L***

1. **Generalization:** use of a gender-specific term to refer to a group of people (including the job title of a person) that could identify as more than the specified gender

***Keyboard shortcut: G***

Example 1: The chairman of the university was born in 1980.

*Explanation: Chair would be the gender-neutral form of chairman*

Example 2: Readers, scholars, and workmen

*Explanation: readers and scholars are gender-neutral, while workpeople or workers would be the gender-neutral form of workmen*

Example 3: Housewife

1. **Gendered Pronouns:** explicitly marking the gender of a person or people through the use of the pronouns he, him, his, her, and she.

***Keyboard shortcut: P***

Example 1: She studied at the University of Edinburgh. In 2000, she graduated with a degree in History.

Example 2: This manuscript belonged to Sir John Hope of Craighill. Sir John Hope was a judge. He lived in Scotland.

1. **Gendered Roles:** use of a title or word denoting a person’s role that marks either a masculine or feminine gender

***Keyboard shortcut: R***

Example 1: Sir Robert McDonald, son of Sir James McDonald

Example 2: Mrs. Jane Do

Example 3: Sam is the sister of Charles

Example 4: Sir Robert McDonald, son of Sir James McDonald

1. **Contextual**: gender bias that comes from knowledge about the time and place in which language is used, rather than from linguistic patterns alone (i.e., sentence structure, word choice)

***Keyboard shortcut: C***

1. **Occupation:** occupations, whether or not they explicitly communicate a gender, should be annotated, as statistics from external data sources can be used to estimate the number of people of different genders who held such occupations; please label words as occupations if they’d be a person’s job title and are how the person would make money, but not if the words are used as a title

Example 1: minister

Example 2: Sergeant-Major-General

1. **Stereotype:** language that communicates an expectation of a person or group of people’s behaviors or preferences that does not reflect the reality of all possible behaviors/preferences that person or group of people may have, or language that focuses on a particular aspect of a person that doesn’t represent that person holistically; for example, women described in relation to their family and home, and men in relation to their careers and workplace; men more associated with science and women more associated with liberal arts

**Note:**Please label whichever words, phrases, or sentences you feel communicate the stereotype.  Three different examples are shown below for how this may look.

**Includes names being turned into ways of thought (e.g., Bouldingism, Keynsian)**

***Keyboard shortcut: S***

Example 1: The event was sports-themed for all the fathers in attendance.

*Explanation: The assumption here is that all fathers and only fathers would enjoy a sports-themed event. A neutral alternative sentence could read: The event was sports-themed for all the former athletes in attendance*

Example 2: A programmer works from his computer most of the day.

*Explanation: The assumption here is that any programmer must be a man, since the indefinite article “A” is used with the pronoun “his”*

Example 3: A man with no doctorate degree being known as Dr. Jazz

*Explanation: Women often receive negative attention for using titles such as Dr (see the WSJ op-ed on Dr Jill Biden for a recent example) while men typically do not*

1. **Omission:** focusing on the presence, responsibility, or contribution of a single gender in a situation in which more than one gender has a presence, responsibility or contribution; or defining a person’s identity in terms of their relation to another person

If initials are provided, consider that enough of a name that it doesn’t need to be labeled as an omission!

***Keyboard shortcut: O***

Example 1: Mrs. John Williams lived in Edinburgh.

*Explanation: Mrs. John Williams is, presumably, referred to by her husband’s first and last name rather than her given name*

Example 2: Mr. Arthur Cane and Mrs. Cane were married in 1850.

*Explanation: Mrs. Cane is not referred to by her given name*

Example 3: Mrs. Elizabeth Smith and her husband went to Scotland.

*Explanation: The husband is not named, being referred to only by his relationship to Mrs. Elizabeth Smith*

Example 4: His name was Edward Kerry, son of Sir James Kerry.

*Explanation: paternal relations only, no maternal relations*

Example 5: The novelist, Mrs. Oliphant, wrote a letter.

*Explanation: Mrs. Oliphant is referred to by the last name she shares with her husband without including her given name*

1. **Empowering**: use of gendered language ~~to challenge stereotypes or norms~~ that reclaims derogatory terms, empowering a minoritized person or people; for example, using the term queer in an empowering rather than a derogatory manner

***Keyboard shortcut: E***

Example: “Queer” being used in a self-affirming, positive manner to describe oneself

1. If you would like to change an annotation you have made, double click the annotation label.
   1. If you would like to remove the annotation, click the “Delete” button in the pop-up window.
   2. If you would like to change the annotation, click the label you would like to change to and then click the “OK” button.
2. Click the right arrow at the top left of the screen to navigate to the next archival metadata description (if you would like to return to a previous description, click the left arrow).
3. If the screen does not advance when you click the right arrow, you’ve reached the end of the folder you’re currently in. To move onto the next file, please hover over the blue bar at the top of the screen and click the “Collection” button. Click the first list item in the pop-up window “../” to exit your current folder and then double click the next folder in the list. Double click the first file in this next folder to begin annotating its text.
4. Repeat from step 11.
5. When you are finished annotating, note down the name of the file you ended on so you can quickly find it in the document list when you revisit brat.
6. Hover over the blue bar at the top of the website and click “Logout;” or if you are using a personal computer, simply close the brat website.

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| --- | --- | --- | --- | --- |
| **Label Type** | **Key** | **Example to Label for Associated Type** | **Example Not to Label for Associated Type** | **Notes?** |
| Person-Name | H |  |  | Notes Required |
| Woman | W | Mrs. Jane Bennet went to Huntsford.  Queen Elizabeth married before taking the throne. | Jane Bennet went to Huntsford.  Elizabeth married before taking the throne. | Notes Optional |
| Man | M | Sir Conrad Hal Waddington lived in Edinburgh and he published scientific papers. | Conrad Hal Waddington | Notes Optional |
| Nonbinary | N | Francis McDonald went to the University of Edinburgh where they studied law. | Francis McDonald went to the University of Edinburgh and studied law. | Notes Optional |
| Unknown | U | Jo McMahon visited Edinburgh in 1900. | Jo McMahon visited Edinburgh in 1900. She walked around the University of Edinburgh’s campus while in the city. | Notes Optional |
| Linguistic | L | God, who is in Himself all the Sovereign good. [Notes: God referred to with masculine pronouns, as is typical in Christianity] |  | Notes Required |
| Generalization | G | The conference attracted many businessmen. | The book is for scholars of history. | Notes Optional |
| Gendered  Pronoun | P | He went to the University of Edinburgh for his studies. | They worked together at the garden. | Notes Optional |
| Gendered  Role | R | Mary was the mother of Elizabeth.  Queen Victoria ruled at this time.  John was the parent of Lady Marie. | Rev. Baillie married Florence Jewel Fowler. [This should only have two unknown person-name labels)  He was the parent of Marie. [This should only include a gendered pronoun label for “He”]  She was anointed Queen of England. [This should only include a gendered pronoun label for “She” (Queen of England will be annotated as an “Occupation” by the other group of annotators)] | Notes Optional |
| Contextual | C | The publication was made during the reign of James VI. [Notes: May be class bias, but since most rulers were kings, could this be considered a gendered definition of time?] |  | Notes Required |
| Occupation | J | He was anointed King of England.  Mendelsshon became the conductor of the orchestra. | King James VI ruled England. | Notes Optional |
| Stereotype | S | Margaret Imrie or Baird his Spouse [Notes: woman described only in terms of her family relations]  He studied at Kings College where he later became professor. [Notes: Man described in terms of his academic studies and career with no mention made of marriage nor family relations]  Dora studied mathematics and music at the University of Edinburgh. She married James Russell Turner who had studied at the city’s Dick Vet. [Notes: woman described in terms of family relations in addition to her academic accomplishments] | Dora studied mathematics and music at the University of Edinburgh. James Russell Turner studied at the city’s Dick Vet. Dora and James married in 1900. | Notes Required |
| Omission | O | Felix Mendelsshon first studied with his mother and then in Berlin with various teachers.  Sir Edward Bolton was son of Richard Bolton. | The photo depicts her parents, Mary and John.  Sir Edward Bolton was son of Richard and Sarah Bolton. | Notes Optional |
| Empowering | E | ~~Discharge by William Pirie in favour of Dr. Sophia Jex Blake was made today. [Notes: Dr. is a gender-neutral title and alternative to Ms./Mrs.]~~ | Dr. John Smith was appointed chair of the committee. | Notes Required |