A Rationale of Trans-inclusive Bibliography

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Abstract

This article posits a framework for the principles and practices of trans-inclusive bibliography, describing its necessity and challenges, considering historical analogues, and offering solutions for trans-inclusive bibliography in digital contexts. Proper names are the primary way that a person is credited with their scholarly labor, yet using names raises ethical issues. Trans-inclusive bibliography shares many of the same ethical concerns and strategies as trans-inclusive citation practices, but differs in terms of scale and stakes. Given that exhaustive enumerative bibliographies are often used to create individual works cited lists, their choices and practices can reverberate through an entire academic field. This article centers on enumerative bibliography, particularly the challenges and potential solutions for the World Shakespeare Bibliography. *Trans-inclusive bibliography requires accepting bibliography's flexibility and contingency, relinquishing comforting myths about the stability of the historical record. We outline the ethical core of trans-inclusive bibliography and offer practicable scholarly habits to implement it.*

Names are important. Beyond the personal, public, and political use of names, names are also key to the way we undertake scholarship by citing and interacting with the ideas of others. Cis-normative assumptions shape the practices of too many publishers, bibliographers, and individual

1. Authorship of this article was shared in equal collaboration; attribution is thus listed alphabetically.

scholars (Sanchez). In this article, we offer a rationale of trans-inclusive bibliography and outline what trans-inclusive bibliography can look like.

Names are Heavy: A Reflection by Kris L. May

I have been reminded about the significance of my name over and over throughout my life. As a young teen, I remember my parents telling me stories about how they selected my birth name and what name they would have selected if I'd been assigned male at birth instead of female.[2] Since beginning my medical transition to male just over five years ago, the significance of my birth name and the gender identity it carries with it has become particularly heavy. As the physical changes of transitioning become more pronounced, the urgency of legally changing my name and gender marker greatly increased. About three years ago, I filed for and received a legal name and gender marker change order from a judge. Fortunately, changing my name in Texas was fairly easy; however, the gender marker change was more difficult because it involved filing petitions for the change in a different county (because no one has ever been granted a gender marker change by a judge in my county of residence) and securing doctors' letters to be filed with my petition. I have also updated my name and gender marker on my driver's license, birth certificate, and passport; updated the name on my social security card; and changed my name and gender marker with the Human Resources Department at my university (which means the name and gender marker associated with my medical insurance and prescription service has also been changed). I am constantly deadnamed, as I find myself having to explain my name change, which may or may not out me as transgender, depending on my history with that person or entity, as well as whether or not their file on me includes a gender marker. The misnaming and misgendering I've experienced while trying to negotiate my way through the health-care industry are also incredibly damaging and frustrating; though my legal name and gender marker have been changed on my health insurance, I still find myself having to explain

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2. A birth name is the name a person is given at birth. Tarynn M. Witten explains, "When trans persons transition, they [often] change their names to match their new identity. Many of them no longer want to recognize their birth name. If someone uses this birth name, instead of the new name of the individual, it is called deadnaming. Deadnaming occurs when someone, intentionally or not, refers to a person who is transgender or gender nonconforming by the name they used before they transitioned. [. . .] Deadnaming is one of the many microaggressions that nonbinary individuals must address" (2001, 176).

to medical providers and pharmacists that the name and gender marker they have on file for me probably needs to be updated (unless it got changed the first time I mentioned it to them, which rarely happens).

For me, my birth name is tightly intertwined with a female gender identity that I was assigned at birth, and as I get further into my medical transition to male, I think of my birth name as something that I'd like to keep in my past. Though it is not "dead" — it still lives on in print and digital worlds as part of my past — it is still a name by which I no longer wish to be referred. Things for me now are very different than they were before I began transitioning. Now that I am finally living authentically, I feel more secure and confident in who I am, and I am finding it easier to manage anxiety. I'm more comfortable in my body and grounded in myself. Living life as a white male also imbues me with privilege that I didn't have as female (and reminds me of the privilege I have always had as white). Most of the people I interact with on a daily basis knew me before I started transitioning, and for the most part, these people are supportive and truly trying to call me Kris and use male pronouns. I've experienced some instances of deliberate misgendering, and what I've discovered from these interactions is that I do not have much patience for expending the energy it would require for me to maintain these relationships. Still, it hurts.

As a graduate student, I co-authored an article and wrote a few reviews that were published using my deadname. My dissertation was submitted and approved with my deadname, and of course, all of my diplomas contain my deadname. I have published a few more reviews with my deadname, and my deadname appears on the masthead of older print versions of the *World Shakespeare Bibliography*. Five years ago, I changed my name on the *World Shakespeare Bibliography* digital masthead, and also my name was changed (at my request) on my department's website; these changes affirmed my identity before securing my legal name change. Even though my name change is now legal, my deadname remains attached to printed publications. My transness is easily discoverable through the internet and electronic databases, and having my deadname attached to me is something I will probably never be able to completely shed. Given that I started transitioning at fifty-one years of age, I have an entire life of paper and digital documents to contend with, and my publications are among those. However, I can absolutely say that my preference for all citations is that the name on my publications be either "Kris May" or "Kris L. May", and not my deadname. Even in just the short time that I've been going by Kris, my deadname seems to be located far away from me. It is there as part of my past, which is where I'd like it to remain (even though the past constantly encroaches upon and becomes entangled with the present and,

inevitably, with the future). I recognize that my deadname cannot ever really be confined to the past, safely tucked away and hidden, as a name I'd rather not be called today. There is only so much that I can do to maintain some distance between me and my birth name; however, I want my work to be identifiable as mine always (in the past, present, and future), and I'd rather my chosen name be attached to that work as I move forward.

I have become more attuned to trans time — a temporality that disrupts the seemingly "natural" orderliness of a chrononormative timeline — as I am particularly aware of those pieces of me and my history that I might rather leave in a past that I can't ever really escape completely. Trans temporality calls attention to those things that undermine chrononormativity.[3] While I'd certainly like to leave my deadname in the past, it continues to pop up along the way. Maybe I don't want to leave everything about it in the past: all of my past achievements, relationships, and histories that — whether or not they "feel" right — have contributed to who I am today. One of the clearest examples of trans temporality pushing against chrononormativity is adolescence.[4] When does a trans person experience adolescence? Chrononormativity tells us that it's during the years of puberty. Hormone replacement therapy (HRT) necessarily complicates the picture. Transitioning later in life, I experience multiple adolescences: one during my teens and once again when I started HRT. Though I may end up rejecting my first puberty as being inauthentic and out of sync with my subjective view of myself, it is still a part of my temporal experience.

Names are important because they are heavy. They carry with them the weight of what I used to be (or, maybe more accurately, the weight of what I wasn't but was trying to be), as well as the intentionality of claiming something authentic and life-affirming for myself. Calling me by my deadname — whether intentionally or by mistake — damages me. It hurts because I have struggled so hard to get to where I am today,

3. Elizabeth Freeman describes chrononormativity as "the use of time to organize individual human bodies toward maximum productivity" and as "a mode of implementation, a technique by which institutional forces come to seem like somatic facts. [. . .] Manipulations of time convert historically specific regimes of asymmetrical power into seemingly ordinary bodily tempos and routines, which in turn organize the value and meaning of time" (2010, 3).

4. As Gabrielle Owen has noted, "[a]dolescence is constructed as the moment that gendered becoming occurs. And yet this developmental narrative is one we impose on experience, locating moments of transition, change, and rebellion in adolescence and locating moments of arrival, stability, and conformity in adulthood" (2014, 23).

as I struggle to be accepted for who I am. Referring to me by my name affirms my personhood, which, for me, includes a gender identity that I have struggled for my entire life to accept and affirm and am now working on celebrating.

Names, Citations, and Scholarship

Naming people is how we share credit and acknowledge labor. As well as acknowledging the importance of names in systems of academic credit, Jane Pilcher shows how "[o]ur names are both constituted by and help to constitute our sexed and gendered selves, our racialized and ethnic identities, and other identifications that make us both a unique individual and a culturally embedded and socially administered citizen" (2016, 776).[5] In academic publishing, proper names are the primary way that a person is credited with their work, yet using names raises ethical issues.

Grappling with name changes is not a new issue for bibliography. Names change for a variety of reasons, reflective of their deep and disparate significance: gender transition; change in relationship status; political awakening; acknowledging, reclaiming, or rejecting familial, ancestral, or ethnic ties; evading prejudice; or dealing with issues of pronunciation or aesthetics. In the context of academic publishing, people have long used different strategies to protect themselves from ingrained gender and racial bias, such as publishing under a different name, or using their initials. Yet the effort to change one's name is often itself stigmatized — for instance, a person changing their name due to marital status can be caught between the contrasting pressures of traditional gender norms and academic expectations of independence and authority (Peterson 2019; Geurin-Eagleman 2015). Therefore, not only names themselves, but the mere act of *changing* one's name can become the basis of prejudice, which can lead to professional, economic, social, physical and/or psychological harm. Even in the cases where name changes are relatively socially sanctioned (with women changing their names upon marriage/divorce being the most salient example), the change still limits access to women's past work and thereby works to exclude women who change their names. Resisting cis-normative bibliography requires rethinking one's assumptions about names and what they imply about the continuity or discontinuity of identity.

Trans-inclusive bibliography, then, is not a matter of making so-called "exceptions" for a small minority, because scholarship and bibliography

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5. See also VanderSchans 2016.

have always been attuned to changing or multiple names. Attending to trans-inclusive bibliography, moreover, does not only help trans authors: inventing and normalizing better name change research practices can help destigmatize all naming and improve research. Trans-inclusive bibliography is about research and access to research that affects the entire academic community and involves both practical and theoretical considerations. That is, trans-inclusive bibliography is both an intellectual and ethical imperative: it reflects sound academic practice, since accurate citation is part of the research process itself. It also recognizes "all scholars who cannot claim the stable and singular identity that is most accessible to scholars who are white, Anglo-European descendent, cis men" (Sanchez).

The matter of name changes adds another layer of complexity to bibliography, but one that ethically-minded bibliographers cannot ignore. The best practices of authorial attribution have long been debated in bibliography (Haspelmath 2008). Citational and bibliographic practices related to name changes often adhere to some hazy ideal of transparency that can actually be humiliating or debilitating for the author in question. In cases where name changes reflect marriage or divorce, private matters can be made undesirably public. In the case of deadnaming trans scholars, this practice can be deadly. Accurately reflecting an author's name, and not outing their personal information without their consent, then, is not merely a minor issue for punctilious bibliographers, but one with major ideological and practical implications. Outing a scholar can lead to economic harm (e.g., termination of employment, negative impact on tenure and promotion), psychological trauma, and physical violence, since institutional affiliations and addresses are often included in publication details. Trans archivist Amy Dobrowolsky (2013c) describes the violence of deadnaming, arguing that "our old names are frequently weaponised against us, often as a precursor to physical violence. And the violence of weaponized old names springs from the same disrespect, mockery, and hatred that informs fatal physical violence".[6] Trans-inclusive bibliography is predicated on the importance of respecting a person's autonomy when it

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6. Dobrowolsky (2013a) writes of her discovery that an author was trans because the library record she accessed for a source included the author's full name: "This record robbed the author of their agency to decide, or not, to disclose this to me". Trans people "need to have agency and control over how much of our histories we disclose". Indeed, "dry, ostensibly matter-of-fact bibliographic records aren't value-neutral".

comes to their name choices — this means not automatically associating a person with a name they no longer claim and also respecting when someone chooses multiple names.

This essay posits a framework for the principles and practices of trans-inclusive bibliography. Our intended audience is people who want to enact an ethical practice of bibliography and citation. Some of this material will be familiar to trans scholars; some will be familiar to bibliographers. Ultimately, bibliography and citation practices still have much to learn from trans studies, as this article outlines. "The act of naming is an act of power", asserts Katja M. Guenther (2009, 412); bibliographers and scholars wield this power when we list and cite. The essay considers particular challenges and potential solutions for the *World Shakespeare Bibliography*, but the issues raised here apply to other large-scale bibliographies, online reference works, and individual academic practice. The question seems simple: how do we cite scholars and their works? The answers, plural, require a flexible and deliberate practice of citation that prioritizes the scholar above the scholarship.

Trans-inclusive bibliography has implications for bibliography in multiple senses: analytic and descriptive, citational, and enumerative. This essay focuses on enumerative bibliography, although some of the principles will extend to other bibliographical practices. Martha M. Yee's definition succinctly captures the goals of this capacious field: "Enumerative bibliography (sometimes called systematic or reference bibliography) [. . .] serves to aid the user interested in a particular subject to discover the existence of works on that subject" (2007, 316). Kate Ozment (2019) defines enumerative bibliography as "critical list-making, emphasis on the critical". Enumerative bibliography can often be taken for granted, especially in the age of digital searching, but it is the bedrock on which scholarly practice is built: enumerative, large-scale, digital bibliography shapes how and what we research. Names are foundational to enumerative bibliography, citation, and scholarship.

Trans studies scholarship on the politics and praxis of citation informs this work on trans-inclusive bibliography. Katja Thieme and Mary Ann S. Saunders describe academic citation as "a process that disembodies knowledge" (2018, 87), concealing trans identities that authors may or may not wish to disclose. On its surface, citation may be perceived as an objective practice of acknowledging academic labor, even though, as many studies have pointed out, citations often "reproduce a range of hierarchical relations" that privilege work by white, cisgender men

(Thieme and Saunders 2018, 81).[7] Much of the work around citational politics outside of trans studies has modeled gender as a binary system that assumes gender is fixed and can be neatly categorized. Trans studies pushes against this by calling attention to trans experience through "the process of developing unique community practices that result in distinctive questioning about how their work can and might be cited" (Thieme and Saunders 2018, 82), as they give space to the work of marginalized researchers.[8]

Katherine McKittrick elegantly describes how "citations are tasked to resist racial and gendered violence through the sharing of ideas. [. . .] [T]his does not mean names do not matter; it means, instead, that naming is enveloped in the practice of sharing how we live this world and live this world differently" (2021, 30).[9] For McKitterick, "referencing, sourcing, and crediting [. . .] takes us outside of ourselves", leading us to "unknow ourselves" (2021, 16). McKittrick continues, "The unknowing brings together unexpected intellectual conversations that, together, *resist dehumanization*" (2021, 17, emphasis ours). When it comes to trans-inclusive citation and bibliography, names and how we use names become a part of the intellectual conversation that resists dehumanization. It is both *who* we cite and *how* we cite that matters.

Thieme and Saunders position trans-inclusive citation practices in the broader "scholarly community of care" (2018, 81) from which trans studies was born. They advocate for an "ethics of care" in citation that "problematize[s] citation as a normative value-free writing practice"

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7. See also Ahmed 2014: "Citationality is another form of academic relationality. White men is reproduced as a *citational relational*" (italics in the original). Ahmed calls on "white men not to keep reproducing white men". Drawing particularly on the field of geography, Carrie Mott and Daniel Cockayne (2017) offer practical suggestions for "conscientious engagement" in our citation practices that can be applied to many disciplines including citation counting, questioning self-citation, valorizing co-authorship, and reconsidering how we value different scholarly outputs (see esp. 966–69).

8. See the special issue of *Diacritics* on "The Politics of Citation" edited by Annabel L. Kim. As Kim notes, "The politics of citation, if it is to be discerned, requires the suspension of this reproductive citational incitation so that the structures of citation might be examined and critiqued: citation must be turned away from its usual function as a practice to serve instead as the object of inquiry" (2020, 5).

9. Ahmed describes "problems with names" more broadly by demonstrating that we need language to describe and understand, particularly from a feminist and antiracist perspective (2017, 31–36). See also Stallings on the subversive potential of unnaming (2007, esp. chap. 1).

(2018, 88). Trans-inclusive bibliography shares many of these same ethical concerns as trans-inclusive citation practices. Trans-inclusive bibliography differs from trans-inclusive citation in at least two significant ways, however. The first relates to a question of scale: comprehensive enumerative bibliographies are much larger, and therefore take more time and effort to compile, than individual works cited lists and citations. The second relates to a question of stakes: given that exhaustive enumerative bibliographies are often a source for the creation of individual works cited lists, its choices and practices can reverberate through an entire academic field. The stakes of trans-inclusive bibliography are also especially high due to its potential for serious consequences in the wider world: public-facing bibliographical records can inadvertently disclose personal information about a scholar without their consent, subjecting them to economic, physical, and psychological harms.

Trans-inclusive bibliography must take both the labor of the scholar and the bibliographer into account in order to seek ethical, actionable solutions. One labor issue potentially confronts another: while ethically acknowledging scholars' labor is necessary, borrowing habits from ethical citation practices — such as reaching out to individual authors for their names and pronouns — could overburden both bibliographers and scholars. Too often, however, cis scholars' convenience is prioritized over trans scholars' recognition, careers, and lives. As Melissa E. Sanchez notes, "cis scholars benefit from citational/ bibliographic business as usual in saved time [and] greater visibility." An ethics of care must transcend the temptation of convenience, which is "tied to the conservation of cis-privilege and power" (SANCHEZ).

Reference bibliographies have shaped and continue to shape the way scholars undertake literary and cultural research; these include the *MLA International Bibliography*, the *Annual Bibliography of English Language and Literature*, the *Iter Bibliography*, and author-focused bibliographies such as the *World Shakespeare Bibliography*, the *Marlowe Bibliography Online*, or the *Margaret Cavendish Bibliography Initiative*. The rationale for trans-inclusive bibliography will also extend to other reference projects and digital research projects.

What is Trans-inclusive Bibliography?

Trans-inclusive bibliography is the practice of bibliography (be it analytic/ descriptive, enumerative, or citational) that affirms people. Trans-inclusive bibliography challenges binary systems and templates, as it requires

scholars to think through the implications of systems they rely on to acquire trustworthy (and, one could argue, apparently stable and fixed) information about sources. To practice trans-inclusive bibliography, begin with the individual: think about how you present yourself and cite others. Destigmatize name changes. Prioritize people over the artefacts they produce. If a person tells you their name, use it.

Trans-inclusive bibliography posits an author from an intersectional perspective, challenging the "cisgender logic" that a "person's gender matches the biological body they were assigned at birth" (Griffin 2020, 9). Trans-inclusive bibliography allows for change and acknowledges that, as Cindy L. Griffin asserts, "identities shift and change in relation to power, access, equity, and respect" (2020, 9). It requires thinking critically about history, and (potentially misguided) attempts to remain loyal to the historical record, and the relative importance of scholars as opposed to their scholarly work. Simone Chess, Colby Gordon, and Will Fisher (2019) note ongoing systemic bias against trans scholars and their lack of visibility or voice. Trans-inclusive bibliography is about making trans voices heard by making their research findable.

Trans-inclusive bibliography also requires retheorizing bibliography and its practices. Rather than positioning bibliography as a way to capture a stable past, trans-inclusive bibliography focuses on ethically attributing academic labor. Bibliographers aspire to stability, but need to acknowledge, and even embrace, instability. Likewise, aiming for ostensible neutrality, permanence, and historical objectivity is not only a fantasy: it can enact harm by upholding cis normative and transphobic scholarly practices while making them seem merely descriptive. History is a construct and reflects power structures; it is naive and false to think it is stable or objective. Traditional citational, publishing, and bibliographic practices tend to be both chromonormative and white-cis-male normative. Trans-inclusive bibliography draws on trans temporality that pushes against chrononormativity.[10] Trans temporality is "asynchronous and non-normative" (DeVun and Tortorici 2018, 520), thus complicating readability according to "temporal designations" of the trans subject (and trans body) (Snorton 2013, 177). Traditionally, bibliography has been invested in chrononormativity and objective history, assuming that the name attached to a piece should always be cited as it appeared on the

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10. For more on queer and trans temporality, see Kadji Amin (2014), who describes the significance of temporality — "the social patterning of experiences and understandings of time" (219) — to trans studies.

published work. Trans-inclusive bibliography operates on "trans time" and rejects this assumption. Moreover, while the harms of traditional bibliographical practices are "particularly pronounced for trans scholars, they also exclude anyone who changes their name over time, and those who change their names tend to be women, BIPOC scholars, and other religious and ethnic minorities" (SANCHEZ). Trans-inclusive bibliography is for everyone.

When does a name become a deadname? This will vary depending on the person. Some trans people, for example, don't think of a past name as a deadname. Instead, they think of a past name as their birth name — not a name that they use now, but also not a name that is "dead". In fact, as Jules Gill-Peterson (2020) astutely points out, consistency of naming and pronoun usage can also have "the opposite of its intended effect in the outcome". Rather than confirming trans identities, adherence to correct names and pronouns enforce the immutability of sex binaries:

> Would-be allies think they are showing that they take trans people's identities seriously by intensely conforming to contemporary conventions, but what they are really saying is *I need you to be legible, clear, and easy for me to understand. I need your gender to make me comfortable.* The system of gendered naming and pronouns itself is completely untouched, untroubled, by this maneuver.
>
> (GILL-PETERSON 2020)

Other trans people very clearly see past names as deadnames — they were assigned the wrong gender marker at birth, and so they change their name to align with their true experience. Trans temporality accounts for both of these responses without assigning a value to either one (in other words, one reaction isn't better than the other one). As Leah DeVun and Zeb Tortorici remind us, "[r]ecent scholarship in trans studies has [. . .] warned against efforts to identify a universal transgender identity across time" (2018, 519). Likewise, trans-inclusive bibliography does not seek or proffer a single solution.

Trans-inclusive bibliography is related to many flourishing fields of study, including inclusive feminist bibliography; data feminism; trans-inclusive digital humanities and data studies; and trans studies. Catherine D'Ignazio and Lauren F. Klein argue for the need for fair credit, equity, and recognition of labor when it comes to data, stating that "data work is part of a larger ecology of knowledge, one that must be both sustainable and socially just" (2020, 200). Bibliography must also position itself in the

larger sustainable and socially just ecology of knowledge. In "Rationale for Feminist Bibliography", which aims to recuperate women's work, Ozment asks "what does book history value?" (2020, 152); this essay asks "what does bibliography value?" and suggests that bibliography should value people and labor over scholarly artefacts.

Laura Horak (2020) articulates some of the questions that a digital humanities project should ask in order to be trans-inclusive. One that applies to digital enumerative bibliography is "How can we represent diverse trans people respectfully and accurately in our database?" (Horak 2020, 2). Trans-inclusive digital projects should aim "not to make trans people more vulnerable to harm" (Horak 2020, 13). Indeed, for many digital projects, trans-inclusivity begins with the very data model itself. For instance, even the most seemingly objective data models, such as those from the International Standards Organization (ISO), can be biased, as with their infamous encoding of sex as binary with 1 for male, 2 for female, 0 for unknown, and 9 for not applicable.[11] Amber Billey and Emily Drabinski, likewise, trace the revision of library standards (notably, Resource Description Access, RDA) related to authors' names so that binary gender is "not encoded into the metadata of library records" (2019, 121). Additionally, the Trans Metadata Collective recently produced a "set of best practices for the description, cataloguing, and classification of information resources as well as the creation of metadata about trans and gender diverse people, including authors and other creators" (2022, 2).[12] As later sections of this article outline, trans-inclusive bibliography is shaped by digital affordances and data models and must speak to — and sometimes change — existing knowledge structures.[13] But automated programs or blanket approaches are often not where solutions lie: smaller solutions at the individual and project level can be both more respectful and effective and have positive ripple effects.

11. For more on how the TEI (Text Encoding Initiative) grappled with and ultimately rejected the ISO standards for encoding gender, see Flanders 2018 and Schwartz and Crompton 2018.

12. Among other things, "Metadata Best Practices for Trans and Gender Diverse Resources" includes a section on name changes and gender identity in name authority records (Trans Metadata Collective 2022, 18–23). Even if a bibliography is not focused on gender-diverse issues, bibliographers should familiarize themselves with the practices established in this document.

13. For more on data models as pivotal to "digital enumerative bibliography", see Coker and Ozment 2019.

In "Towards a Trans Inclusive Publishing Landscape", a group of trans scholars discuss the roadblocks and objections they encountered from publishers while attempting to change their names in previous scholarly publications (Tanenbaum et al. 2020). Some publishers refused to make any changes; others published errata, which still carries the stigma of error; and yet others changed only some data, thus ensuring that the deadname is still publicly circulated with the authors' previous work. As they note, in addition to harming and discriminating against trans scholars, not changing names when requested "is damaging to scholarship at large. It interferes with the bibliometrics that are used to assess a work's impact, it produces confusion about how to cite and attribute scholarship, and it endangers the tenure and promotion process of an already vulnerable minority. [. . .] Failure to update public facing records increases the risk of inadvertent disclosure, and has material consequences for trans people" (Tanenbaum et al. 2020). Quite simply, "[c]ontinuing to disclose and disseminate their deadname perpetrates an act of violence against a trans person" (Tanenbaum et al. 2020). Trans-inclusive bibliography is only part of the picture: academic publishing, too, will have to make ethical decisions when it comes to names and credit. Recent developments include vendors, laboratories, and journals announcing policies to support author name changes, such as JSTOR, Springer Nature, arXiv, and more.[14] Tanenbaum et al (2021) offer publishers concrete steps for supporting author name changes.

If publishers support name changes but bibliographers do not, however, the system remains flawed. How bibliographers handle authors' names in bibliographical entries has consequences that reach beyond any individual bibliography. A reference bibliography will be used to create further citations, which, particularly when it comes to name changes, can beget further miscitation, and even adversely affect a scholar's academic and personal life.

Trans-inclusive Citation Practices

Scholarly style guides differ in their recommendations for trans-inclusive citations, if they are even discussed. The most recent *MLA Handbook* (9th edition, 2021) added the following caveat to their explanations on how to cite people whose names have changed:

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14. See JSTOR 2021, Langin 2021, and Nerzig 2021.

> If you are writing about or working directly with an author whose name changed and you know that they do not use their former name in references to their work — for example, for trans authors — list their works under the name they use, regardless of the name that appears in the source. Do not supply information about the name change or cross-reference entries, and avoid using the former name in your prose.
>
> (2021, 5.15)

The APA style guide points out that in the case of name changes generally (citing trans people as one example), "It is seldom relevant to note that two names refer to the same person" (2020, 8.20). Where it is important to note that two citations with different names refer to the same person, APA recommends that the author "consult the person and respect their preferences in whether and how to address the name change" (2020, 8.20). Although *The Chicago Manual of Style* (2017) does not include anything in the text itself on trans authors or respecting author names, the manual's online Q&A (n.d.) suggests contacting trans authors.[15]

Clearly, scholarly citation manuals are starting to acknowledge the need to recognize name changes in an ethical way. Until recently, however, many style guides recommended including a scholar's actual name alongside their former name, the latter often contained in square brackets — and these recommendations continue to be found online and followed today. Yet the typographically-conspicuous square brackets only serve to draw attention to the fact of a name change. Encouraging the citation of both names in order to adhere to a rigid and outdated notion of "historical correctness" effectively recommends deadnaming trans scholars. Deadnaming with square brackets is still deadnaming. Whether one thinks of their past name as a deadname or as a birth name, that name can still be used against them. Chrononormativity assigns significance to the name assigned at birth (or shortly thereafter) and then to a name change dictated by marriage and family laws and customs. Trans temporality allows for multiple names, as well as acknowledging that names can be harmfully deployed through deadnaming. We do not recommend using square brackets for deadnames unless it is the preferred choice of the scholar in question.

Scholarly style guides and citation manuals are in the process of formulating trans-inclusive citation practices. Guides currently exist for media coverage (GLAAD n.d., Trans Journalists Association n.d.), copy-editing (Kapitan 2017), and academic terminology (Spencer-Hall

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15. See also Elletson 2019.

and Gʊᴛᴛ 2021). Trans-inclusive bibliographers should rely on these resources especially as a guide for terminology; however, these resources do not address the question of how to cite scholars and the politics of reference works.

If you are uncertain about how to cite a scholar and want to bring an ethics of care to your citations, an easy first step to determine how a scholar wants to be cited is to search the title of the piece you want to cite on ORCID.org. ORCID.org is a site where scholars can claim a persistent and unique identifier to distinguish their work from others'. This is effective for disambiguating people with the same names and can also link a person's body of research even when it is published under different names. The case for using the ORCID registry has been made compellingly over more than a decade.[16] Researchers can claim their ORCID identifiers and then choose their "published name", which is, as the site explains, "How you prefer your name to appear when credited. This is the name that appears at the top of your ORCID record". Researchers can then also list "Additional names" if they so choose, which the site notes "can include an abbreviated first name, variants including middle name(s), former or alternate name(s), or name(s) in a different character set" (ORCID 2020). If you find a researcher has created an ORCID, cite them by the name at the top of their ORCID, even if it does not match the name on the publication. Claiming an ORCID is a way for academics to publicly choose how they want to be named. If you don't yet have an ORCID, making one for yourself is a way to support trans-inclusive bibliography.

Not all people have ORCIDs. Professional or scholarly sites that should display a scholar's name of choice include an institutional webpage or a public profile. In some instances, there will be out-of-date information on some websites; it should take very little sleuthing to determine what is the most recent information. Indeed, in your searching, you might even come across an instance where a scholar cites their own work that was originally published under a different name; in those instances, follow the self-citation.

APA and *The Chicago Manual of Style*'s suggestion to contact authors to ask how they wish to be cited produces mixed effects. On the one hand, scholars are often happy to hear from people who are reading and citing their work, and reaching out could show that you care enough to cite people in the way they choose to be cited. On the other hand, reaching out to a possibly trans scholar places additional burdens on their time (scholars from underrepresented groups already shoulder outsized service loads);

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16. See, for instance, Aᴋᴇʀs ᴇᴛ ᴀʟ. 2016, Rᴇᴇᴅ 2017, Vɪᴇɪʀᴀ 2015, and Vɪᴇɪʀᴀ 2016.

additionally, the scholar may feel exposed by an email inquiring about their identity. The potential for unwanted exposure via email is doubly true on social media. It is never acceptable to reach out to a scholar on a social media platform if they are not clearly using it for academic purposes. However, if a scholar is active on social media and clearly links their social media presence to their current job, you may cite their name, if it appears, on social media such as Twitter.

Not every scholar will be findable online, and this could reflect their choice. If a cursory search of ORCID yields no results and there are no easily findable public profiles, then simply cite the article by the name with which it was published. There are any number of reasons a person might not want to link a present name with a past one, and ultimately, this choice belongs to the author. The online presences of academics can make it easier to thoughtfully and ethically cite trans scholars, but ultimately, it is attention to the individual that makes these choices trans-inclusive.

Shakespearean Bibliography: Analog and Digital Practices

Creating trans-inclusive works cited lists as discussed above is, indeed, one aspect of trans-inclusive enumerative bibliography. The practical issues change, however, when considering the scale of an exhaustive reference bibliography compared to, for instance, the dozens of works cited entries at the end of a journal article. Citation practices are built on much larger reference structures, including enumerative bibliographies and library catalogues. While individual scholars can take on the labor of writing trans-inclusive works cited lists and using trans-inclusive vocabulary, the work of changing enumerative reference bibliographies is a structural undertaking.

This essay's attention to enumerative reference bibliography focuses on the *World Shakespeare Bibliography* (WSB), a searchable electronic database consisting of over 136,000 annotated records of Shakespeare scholarship, performance, and editions.[17] For years, the *World Shakespeare Bibliography*'s practice was to represent names in entries as the names appeared on the sources being annotated. Authors of articles and books, as well as editors of book monographs and edited collections, appeared in entries with the exact

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17. At the time of writing, Heidi Craig was the editor, Kris May the associate editor, and Laura Estill the former editor of the *World Shakespeare Bibliography*.

same name as on the published material. Names of directors, actors, and crew members for stage productions and films were listed as they appeared in published programs or handbills, as well as film posters and publicity materials published and distributed by theatre companies and film studios. If an author's name appears differently in an article published in 1995 than it does on the title page of a book monograph published in 2005, then that author's name appeared differently in the two corresponding *WSB* entries. This article stems from the *WSB* editorial team's reconsideration of the practice of unquestioningly copying names from original sources in light of its potential hostility towards trans people named in the *WSB*.

Although it can seem that bibliographies emerge fully-formed from the ether, they are crafted by individuals.[18] Even the most systematic bibliography is liable to be shaped by uneven bibliographic practices, especially if, as with the *WSB*, the bibliography ranges over multiple decades, languages, and tenures of different editors and contributing bibliographers. The global scale of the *WSB* means that it includes entries for non-English articles, books, performances, and so forth, which can produce names that do not fit easily into a taxonomy formulated in English using the Latin alphabet. Languages with other letterforms such as Japanese or Sanskrit are transliterated into English. Inconsistencies in transliterations of names and titles arise because transliteration practices change over time and, indeed, there can be more than one "correct" transliteration. Names themselves are not stable, even when a person does not change their name.

Even the relatively narrow field of Shakespearean bibliography has long had to grapple with how to represent names; decisions about individual names, then, are neither uncommon nor exceptional. The story of Sir Sidney Lee (1859–1926), a respected literary scholar and former editor of the *Oxford Dictionary of National Biography*, offers an example of how name changes impact and are impacted by bibliography. Sources differ both about Lee's prior names and the point at which he changed them; some state that he changed his name from Solomon Lazarus Lee or Simon Lazarus Levi (Halpern 1997, 174). The multiplicity and variety of Lee's names is a useful

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18. And while algorithmically created (and often, corporate) bibliographies exist, they are not the norm in literary studies; when they do exist, they often replicate inequalities, particularly when it comes to ignoring voices from the Global South (Gil 2021). The many individuals who have contributed to the *WSB* are listed on the "Acknowledgments" page (https://www.worldshakesbib .org/acknowledgments) and "International Committee of Correspondents" page (https://www.worldshakesbib.org/international-committee-correspondents).

reminder that the best and simplest solution to properly name a scholar is to call them by the name they choose.

Lee was of Jewish descent (Bell and Duncan-Jones 2009); the changes to his first and last names reflected his effort to downplay his Jewish heritage in a moment when anti-Semitism permeated not just society at large but also the academy, and Shakespeare studies in particular as a domain of white Englishness. The early twentieth-century bibliographer William Jaggard refused to acknowledge Lee's name change in his *Shakespeare Bibliography*. As Clark S. Northup observes, in Jaggard's bibliography "the works of Sir Sidney Lee are strangely referred to S. L. Levi, the name which Mr. Lee formerly bore. To anyone who knows of the previous encounters of the two men, the animus of the reference is evident. In a work of this kind such a display of odium theologicum is as contemptible as it is amusing" (1912, 226).[19] Jaggard's appalling treatment of Lee reveals the professional and emotional stakes of bibliography. Moreover, even as Northup recognizes the contemptibility of Jaggard's naming practice, he still calls it "amusing", suggestive of the struggle to be properly named by those mostly sympathetic to the practice.

Modern Shakespeare scholars are accustomed to instability in naming practices. In Shakespeare's plays, characters' names change from one edition to the next, and within editions: Random Cloud describes five speech tags for a single character (1991, 90). Fittingly, "Random Cloud" is one of the many names under which a single scholar publishes, including Randall McLeod, Randall M Leod, Laksmi Cohen MacGregor, R. MacGeddon, Ana Mary Armygram, Orlando F. Booke, and Claudia Nimbus.[20] Cloud's unstable, multiple names underscore the impossible ideal of historical stability and objectivity. Jonah Coman (2018) offers Random Cloud as a productive and vivid example of "authorial citation-breaking". The many names under which Cloud publishes is a useful reminder that scholars are not required to publish under their legal name or to maintain consistency across their careers.

The instability of names necessitates a mindful and flexible citation practice. After years of trying to fit names into chrononormative and

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19. We acknowledge that this example relies on revisiting an instance of deadnaming. We chose this example because revisiting this instance will not harm Lee or his reputation.

20. Cloud's multiple names are consolidated on a single University of Toronto faculty webpage in the Department of English (n.d.) assigned to "McLeod, Randall", a page that will likely not persist forever.

objective ideas of bibliography, the *World Shakespeare Bibliography* policy is now to respect a person's name of choice. As its "About" page states, editors welcome emails from creators wishing to update their names.[21] If someone has made a public statement on how they wish their previous works to be cited, say, on a blog, and this comes to editors' attention, they will update the *WSB*'s entries accordingly. If someone contacts editors to request a change in how they are listed in the bibliography, there are multiple ways this can be manifested, including but not limited to the question of square brackets or not and, as discussed below, how to handle links. Each bibliography, catalogue, or digital project will have different metadata structures or specific practices, and as such, each will have to grapple with the data modeling questions and possible workflows towards achieving a trans-inclusive bibliography.

While the *WSB*'s policy on names sounds simple, there are, as always, complicating factors: not everyone will know about the *WSB*'s policy and send a request. Furthermore, if someone changes their name (for any reason), editors will not automatically change all past references to their work, because this might not reflect their choices, either. The current practice of the *WSB* is to accept the name(s) given on a publication until editors hear otherwise from an author. Instead — and as always — editors rely on the community to help them do their best and hope this invitation will also help strengthen that community.

Although the *World Shakespeare Bibliography* began as a printed bibliography, it is now, like most enumerative reference bibliographies, a digital project. A digital project is dynamic, flexible, and revisable. As such, digital projects can be better positioned to respond to trans temporality and name changes than print bibliographies. This section explores how the potential flexibility of digital reference bibliography must be considered in relation to technological affordances and functionality for both bibliographers and users. As an online bibliography, the *World Shakespeare Bibliography* is continually updated and amended; cross-references are added between old and new entries; information from past years that has been previously missed is filled in; typos are fixed; and author names and links are updated to be trans-inclusive.

In the *World Shakespeare Bibliography*, the question of names and data models are directly reflected by the taxonomies on which the site is built. Even something as seemingly minor as a middle initial can stymie digital taxonomies. In the *WSB* name taxonomy, "Jane Li" is separate from

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21. See Craig n.d., "About", https://www.worldshakesbib.org/about.

"Jane X. Li" even if they are the same person. There are good reasons for names with initials to be differentiated from names without: it can disambiguate people with similar names. Conversely, if there are two scholars who publish using the exact same name, it is beyond the ability of the *WSB* editorial staff to determine which "Jane Li" wrote which article, and two authors' works would be shown as the output of the same creator.

Heidi Craig, editor of the *World Shakespeare Bibliography*, initially started publishing with a middle initial ("C"); she stopped this practice for later publications. APA's practice of listing authors by only initials rather than given names is sometimes touted as a solution to gender bias, and, in this case, possible transphobia, but is no panacea: not all name changes retain the first initial (or even surname), and, furthermore, people should not feel obligated to publish under initials in order to hide their identity, gendered and otherwise. Using only initials for given names can also lead to disambiguation problems: in Shakespeare studies alone, there are at least three individuals to whom publications ascribed to "H. Craig" can refer: Hardin Craig, Hugh Craig, and Heidi Craig.

Digital solutions that batch process names (such as semantic web technologies) are, at this point, not the solution for trans-inclusive bibliographies; perhaps, in the future, however, ORCIDs and other authority files could be operationalized to send updated information to digital projects. In this imagined reality, someone could update their name in one place and have the changes populate to multiple other sites including reference bibliographies. This is, however, not a current reality, as you will know if you have ever tried to update your affiliation or email.

While changing an author's name in an online bibliography might seem to be the simplest undertaking, that decision has cascading effects. One is that someone searching using the deadname will not find the item represented in the bibliography. (This could be mitigated with the square bracket solution, if an author desires.) As JSTOR (2021) notes in their recent policy to support name changes, removing or changing an author's name can have "potential impacts on discoverability of the work". Another functionality that can be affected by changing names is outward linking. The *World Shakespeare Bibliography* is a bibliography proper: it is not a database that includes copies of the materials it lists. The *WSB* allows users to click on a button to see if their library has access to a given item indexed in the *WSB*.[22] This button (often labelled "Get It For Me" or

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22. This system is built on COinS (Context Objects in Spans) and OpenURL. The "Find Text" (or equivalent) button works best for journal articles, many of which

"Find Text") will be familiar to users from other bibliographies or search results. The OpenURL query (that is, the "find text" functionality) uses the metadata associated with an entry in the bibliography to look in a library's digital catalogue to see if there is a potential match. The links to materials outside the *WSB* query metadata fields including author name. As such, to change an author's name in the *WSB* to a name that is not on a published work is to reduce the chance of being able to access that work in a click or two, which, in turn, reduces the chance of that work being cited. To put it bluntly, to be cited accurately can risk not being cited at all.

Changing the given name in the *World Shakespeare Bibliography* will not affect the "find text" link to the article even if the given name is different on the published article. If an article is credited to "Estill, Lane" in the *World Shakespeare Bibliography*, it will lead to the publication by Laura Estill if it is in the subscribing library's holdings. Changing the surname, however, will stymie the OpenURL query so "Estin, Laura" will not link to an article by Laura Estill even if the rest of the metadata is the same (journal title, article title, volume, issue, pagination).

In addition to OpenURL functionality, the *WSB* includes direct links to open access publications, which is one means to maintain findability for publications even if an author changes their name. Where possible, links rely on Digital Object Identifiers (DOIs) and permalinks (permanent URLs) so the link itself will not expire. Linking directly to open-access publications means that if a scholar has changed their name in the *WSB* and with the original publisher, their work can be findable without having a deadname ever revealed to the researcher. If a scholar archives their publication, for instance, in an institutional repository or *Humanities Commons*, the *WSB* can then directly link to the archived version of the publication.[23] Choosing how your work is linked can be just as important as how your name is represented.

The *WSB* does not change people's names in the database without their permission, request, or a public statement that includes both former and current name. Trans-inclusive bibliographers would not want to give one name in the bibliography that links to a source where a previous name

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are available in online databases; it rarely returns results for books, even if the library has access to an electronic copy. It will return no results for productions because there will be no results to return.

23. It is not currently possible to remove the "Find Text" or "Get It For Me" button from a single entry or group of entries in the *WSB*, but the *WSB* can provide direct links to repositories where scholars control their own names. The *WSB* will, when requested, add or update direct links to open access publications.

was not updated, which could "out" someone as trans. Furthermore, when people contact the *WSB* about name changes, editors outline the existing options for external links from the entry, which might affect their choices. While a theatre director might have no qualms changing their name because the mandatory "Find Text" or "Get It For Me" button will not lead to their deadname, the author of a journal article hosted online who is unable to get the journal or vendor to change it might feel differently.

Some may view the prospect of changing names in a bibliography as a threat to the perceived "sanctity" of the historical record. Tanenbaum et al. (2020) cite one computing professional from the Association for Computing Machinery (ACM) who voiced their concern about "the cultural shift to everything being digital" and "the ease with which information can be silently filtered/changed/suppressed". The ACM professional anxiously asked, "Can we trust an archive that modifies its artifacts?".[24] Yet, as demonstrated here, any repository of information — archives, bibliographies, catalogues — makes decisions that modify entries. The flexibility of the digital is a feature, not a bug. Indeed, if the Library of Congress can change its authority files to support individuals (Dobrowolsky 2013b), so can digital reference bibliographies. Bibliographers would do well to realize that stability is a fiction, and that, in every area, change is constant and inevitable.

Digital reference bibliographies impact how citations are shared and circulated — the *WSB*, for instance, allows users to email themselves or someone else with a list of annotated bibliography entries. Furthermore, the *WSB*, like most reference bibliographies, supports citation management software such as Zotero, many of which are in turn equipped with social features where users share citations with one another. It can seem impossible to change a name in every place it appears: but changing a name in a reference bibliography can lead to future use of a creator's correct name.

Updating the *World Shakespeare Bibliography*, or any single bibliography, is only one step towards creating a trans-inclusive academy structured around publication and citation practices that value the individual and their labor. Tanenbaum et al. (2020) recommend that "name change policies [. . .] extend to all instances of the published name, in both the trans scholar's work, and in the bibliographies of all scholarship that cites that

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24. Tanenbaum et al. report that, after much negotiation, the ACM did agree "to update all publicly accessible digital materials related to an author whose name has been changed", even though "[t]he previous version would be retained in a separate repository, accessible only when a subpoena is served" (2020, 493).

work"; while this recommendation was written with "bibliography" in the sense of "works cited", it holds equally true for reference and enumerative bibliography. Bibliographers cannot change how names are represented in other places, but bibliographers can make a difference by respecting creators' wishes on how their names are represented. One positive change can lead to positive downstream effects; changes in reference bibliographies could help produce a flood of trans-inclusive academic practices. Moving towards trans-inclusive bibliography is an important step to creating a trans-inclusive academy, because as this essay has shown, bibliographies are inextricably linked (metaphorically and digitally) to research and scholarly practice.

Conclusion: Rethinking Bibliography

Moving towards trans-inclusive bibliography requires rethinking bibliography altogether. Is a bibliographer's job "simply" to "accurately" "describe" "names" as they appear on a publication? Even the most stolid bibliographers have pushed against notions of bibliography's seemingly scientific objectivity: the mid-twentieth century bibliographer W. W. Greg observes, "[i]t will perhaps be contended that bibliography has been, probably that it must be, a descriptive science. In a sense this is true. In a sense every science is descriptive. But insofar as a science is merely descriptive it is sterile" (1914, 40). More recently, Erin McGuirl (2017) notes, "I've often used the word accurate in reference to description. An accurate description might seem like an obvious necessity for the scholar bibliographer, but it is not often easily achieved". The historic record, furthermore, is not guaranteed to be accurate: errors happen at all levels of publishing and citation. For instance, if a work were accidentally printed with a typographical error in a scholar's name, it would not make sense to misspell that scholar's name in a citation out of some fidelity to the so-called accuracy of the source. Accuracy and fidelity to the historical record may seem like obvious goals for a bibliographer, but these goals are neither obvious, uncomplicated, nor ideologically neutral.

Bibliography has not yet had to radically rethink itself in the same way as other disciplines in the arts and sciences, where the notion that history is not a static, objective truth is a given. History is a construct, one that upholds certain biases. Bibliographers play a crucial role in that construction; hence they need to contribute to positive transformation. The function of bibliography is not preserving the sanctity of the

historical record but ethically crediting academic labor. It is not the historical record that is sacrosanct, but human dignity.

Bibliography is a foundational part of the academic publishing and research ecosystem; bibliographers have a large role to play in moving towards a trans-inclusive academy. Practical solutions must meet ideological ones: changes are needed in policy, process, and principles. Presently, the burden of added time and labor (both practical and emotional) falls to the trans person to reach out to publishers in order to "correct" papers they have produced. This is time and energy taken away from research, teaching, and service. At the *WSB*, promoting and implementing a clear policy to support accurate creator naming is one way that bibliographers can begin to redistribute this burden from individual scholars to the field at large. Digital tools can unite different papers published under different names or change the assigned names on older papers while not fundamentally impeding searchability (if humans can change names, so can papers!). And while reference bibliographies begin to grapple with the systematic, digital means to ethically reflect name changes and scholarly credit, individual scholars, too, can enact trans-inclusive bibliography and citation practices by valuing people over the work they produce.

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