Subject Access Tools in English for Canadian Topics

Canadian Extensions to U.S. Subject Access Tools

By Robert P. Holley

Canada has a long history of adapting United States subject access tools, including the Library of Congress Classification (LCC), Library of Congress Subject Headings (LCSH), the Dewey Decimal Classification, and the Sears List of Subject Headings, to meet the specific needs of Canadians. This paper addresses the extensions to these American tools for English-speaking Canadians. While the United States and Canada have many similarities, differences exist that require changing terminology and providing greater depth and precision in subject headings and classification for specifically Canadian topics. The major effort has been for Library and Archives Canada (LAC) systematically to provide extensions for LCC and LCSH for use within its cataloging records. This paper examines the history and philosophy of these Canadian efforts to provide enhanced subject access. Paradoxically, French-speaking Canadians may have found it easier to start from scratch with the Répertoire de vedettes-matière because of the difficult decisions for English-language tools on how much change to implement in an environment where most Canadian libraries use the American subject access tools. Canadian studies scholars around the world can use Canadian records, especially those maintained by LAC, to obtain superior subject access for Canadian topics even if they obtain the documents from other sources.

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Introduction

Canadian libraries have long grappled with the tension between the efficiencies of using United States subject access tools and the desire to provide subject access to uniquely Canadian content when such subject access is not adequately provided by these American systems.

Classification was the easier challenge since it is not language specific. Efforts began in 1941 to devise expansions, based upon the Library of Congress Classification (LCC) that would provide greater detail for Canadian history and Canadian authors. Libraries and Archives Canada (LAC) also collaborated with the Library of Congress (LC) in developing Class KE for Canadian law. The Dewey Decimal Classification (DDC) presented fewer problems because DDC has always been open to variations to meet local needs. In addition,

Canadian librarians have worked cooperatively with DDC on revisions of Canadian topics. (In this paper, Library and Archives Canada will be used, except in quotes, even when the library was known as the National Library of Canada during the period under consideration. Library and Archives Canada was formed on May 21, 2004.)

The issue of verbal subject access posed additional challenges. For French language libraries, the decision was easier since using English language subject access systems was impossible for those libraries. Very early, the Université Laval created a translated subset of *Library of Congress Subject Headings*, the *Répertoire de vedettes-matière (RVM)*, which has gone through multiple editions since 1946.[1]

The situation is more complex for English language subject access in Canada because English-speaking Canadians share a common language, albeit with some difference in spelling and meaning, with the United States. Even more importantly for subject access, "basically both countries are federal states with a division of power between two levels of government and with a population composed of groups of many ethnic origins."[2] Despite these similarities, significant differences exist.

> Our needs for information-retrieval terms for Canadian topics are based on the unique nature and development of our own society, which is based on 2 founding peoples, three aboriginal groups, two official languages, and many ethnic groups contributing to the Canadian multicultural mosaic. These aspects of Canadian culture cannot be adequately expressed within the constraints of LCSH. Without CSH, we would have to use terms such as "state governments" to refer to provincial governments or "foreign speakers" to refer to Canadians learning English or French as a second language.[3]

Since the 1960s, efforts by the Canadian Library Association and then by LAC have resulted in a list of *Canadian Subject Headings* that is now maintained within the AMICUS database and includes more than 6,000 headings plus the associated references. The last English language access tool to be discussed in this article is the *Sears List of Subject Headings: Canadian Companion*, which is now in its sixth edition and intended for use in smaller libraries.

All the Canadian tools, with the exception of *RVM*, are intended to be used as extensions to the corresponding American tools rather than as replacements. The Library of Congress officially recognizes the LAC extensions and has agreed not to take any actions that would compromise their usefulness.

This paper considers first the 1972 *Report of the Canadian Task Force on Cataloguing Standards* because of its critical importance in the history of Canadian cataloging.[4] It then provides the history of each classification and subject heading tool, describing its principles, giving its current status, and commenting on its relationship to the corresponding United States tool where appropriate. For subject headings, the focus will be on English language tools. The *Répertoire de vedettes-matière* will be treated only insofar as this French language subject heading list is part of the national system of bibliographic control. *Canadian Subject Headings* receives the most attention as the most well developed tool within the Canadian English language context for providing subject access to Canadian specific information. The paper next briefly considers use of these extensions in various bibliographic tools and notes that additional research is required in this area. The paper finally presents a short discussion of similar developments in other English language countries before giving its conclusions.

All official LAC documents are produced in both English and French including the various classification schedules maintained by LAC. References in this paper will be to the English language versions.

Report on the Canadian Task Force Cataloguing Standards, 1972

The 1972 *Report of the Canadian Task Force on Cataloguing Standards* deserves its own discussion because of its key influence on the tools that are the subject of this paper. The Task Force came into existence due to a recommendation at the National Conference on Cataloguing Standards held at LAC in May 1970. "A Canadian Task Force on Cataloguing Standards has been set up to study and identify present deficiencies in the organizing and processing of Canadian material, and the cataloguing problems of Canadian libraries, and to make recommendations for improvements."[5]

While concerned with all areas of cataloging, the Committee made six recommendations on "Classification of Canadian History and Literature," five recommendations on "Classification of Canadian Law," and eight recommendations on "Canadian Lists of Subject Headings." The end result was much greater involvement by LAC in the support of cataloging tools. While one might be tempted to compare this new role with that of the Library of Congress, the recommendations formally state that LAC will provide support beyond its own collections as a national library and will serve both official linguistic communities—a legal status that the Library of Congress does not have in the United States since its official role is to serve the United States Congress. The specific results of these recommendations will appear in the selections below.

Canadian Extensions to Library of Congress Classification

Canadian History Classification Schedules

Multiple extensions to LCC Class F, local United States history, and the history of the rest of North and South America, appeared before LAC published its first edition of the schedule on September 1, 1976.[6] These included variant treatments developed within the English- and French-speaking communities.

In 1941, Lamb developed the original F5000 schedule as a more detailed classification scheme for Canadian history to classify the Howay-Reid collection in the library of the University of British Columbia.[7] He did so because "Canadian history fares almost as badly in the Library of Congress classification as it does in the decimal system" and because "whenever Canadian and American history intertwine . . . or even run closely together, the latter tends to absorb the former."[8] "Subsequently a number of other libraries adopted this schedule for the classification of their own collections."[9] In 1952, Peel at the University of Alberta provided the first major revision and expansion of this classification schedule. His library and a few others, including the University of Toronto, adopted the revised classification. The major innovation was separate numbers for regions.[10] The second revision was a cooperative effort between the Public Archives and the Cataloguing Division of LAC.[11] It extended the period subdivision 1914–39 to 1914–45 and included 21 pages of classification schedules.

In 1969, the Bibliothèque nationale du Québec, in cooperation with other libraries in Quebec, developed a completely revised F5000 schedule that was independent of the other versions.[12] Its major change was the subdivision of historical periods by administration in keeping with LC practice. It was adopted by several Québec research libraries.[13]

At the time of the *Report on Cataloguing Standards*, all four versions were in use by at least a few of the twenty-four libraries that responded to the survey sent out in preparation for this *Report* though slightly more than the majority (fifteen) used the 1960 Public Archives edition.[14] The *Report* stated that none of the four versions was "totally acceptable" and that all except the Québec version were "very much out of date in respect to chronological subdivisions and treatment of events of the last decade."[15] The *Report* noted additional "shortcomings" such as: (1) the absence of standard subdivisions for cities and towns; (2) lack of explanatory notes, references to other numbers, and an index; (3) inadequate treatment of the Canadian provinces. The *Report* then recommended that LAC appoint two experts, one in each official language, to revise the schedule by taking the best features of the four existing versions. "The revision is to follow the principles of the Library of Congress Classification."[16]

The more general classification recommendations, which also apply to the Canadian literature classification schedule discussed below, were that LAC: (1) take over responsibility for the publication and maintenance of the approved schedules; (2) develop the schedules with "parallel treatment where relevant" with Canadian subject headings; and (3) have the headings reviewed by committees representing potential users and classification experts prior to publication.[17]

The first edition of the revised extensions for Canadian history became available on September 1, 1976, with seventy-eight pages of classification, seven tables, and an index.[18] The Preface, dated January 19, 1976, states that LAC chose to use the notation "FC" to avoid conflict with the earlier versions of F5000. The Library of Congress endorsed FC as an alternative classification and promised not to use FC for its future expansions of Class F.[19]

"The new schedule has greater similarity to the E-F schedule for American history than the old F5000 did. It attempts to classify Canadian history more logically and in greater detail than the latter. It differs from most earlier schedules in its provision for unspecified special topics."[20] The introduction also includes complex rules for the classification of biographies since biographies can be grouped with very specific topics.

The second edition of the FC Classification was published in 1994.[21] It includes an outline, the classification schedules, seven tables, and an index for a total of around 140 pages. In comparison, Canadian history in the Gale LCC cumulation through 2004 occupies twenty-seven pages.[22] Based on "its eighteen years of experience with the FC schedule," the major changes are: (1) historical periods are brought up to date and "new established time periods for the provinces have been made broader whenever this was possible"; (2) more examples under biography and special subjects are given; and (3) names used in the schedule are established according to the AACRII, 1988 revision.[23]

After that, the FC classification grew slowly. The first *Additions and Changes*, published in 1995, opened a new chronological period for Québec with only one page each for the schedules and the index.[24] A more important change occurred in 1999 when a second *Additions and Changes* included six pages of classification revisions occasioned by the creation of Nunavut and its effect on the Northwest Territories.[25] *Additions and Changes #3* and *#4* as well the second edition and earlier *Additions and Changes* are now available on the Web as PDF files.[26]

Canadian Literature Classification Schedule

The major issue for the classification of Canadian authors has been whether to integrate or separate literature in the two official languages. The classification has otherwise

remained relatively unchanged since its creation in 1952 by McCoy, who was also responsible for the current 1978 revised edition.[27] The 1972 *Report* described three prior methods to resolve the issue of authorship in the two official languages. The official schedule, used in a slightly revised 1964 version by LAC, offered the choice of either using odd numbers for one language and even for the other or of classifying all materials under one set of numbers.[28] It was a brief schedule with nine pages including one table and a classification scheme for individual authors. The third alternative, unanticipated in the original schedule, was a mirror classification, PS9000, for French-Canadian literature. The survey taken for the 1972 *Report* determined that five libraries used the odd-even number approach to separate English and French materials, six libraries integrated the two languages, and eleven libraries classified English language materials in PS8000 and French in PS9000.[29]

The *Report* recommended that "the PS8000 numbers are to be adopted as the standard for Canadian literature so that the English and French language materials are classified as one literature" while still retaining the even numbers and making PS9000 available for those libraries that wished to continue to use these alternative systems.[30] The same general recommendations described above for the FC history classification applied to PS8000 so that LAC was charged with revising, publishing, and maintaining the schedule. LAC published a revised edition as described below.[31]

The Preface to the 1978 second edition, jointly signed by J. H. Howard from Library of Congress and C. Durrance from the National Library of Canada, acknowledges that PS8000 is incompatible in principle with LC practice "both in its assembling Canadian literature regardless of language and in keeping novels with the rest of Canadian literature instead of placing them in PZ" (though the second variance has subsequently become LC practice).[32] As with FC, the Library of Congress nonetheless endorsed PS8000 as an official alternative classification scheme with the assurance that it would never develop the PS8000 area for its own uses.[33]

Overall, the 1978 edition of PS8000 presents a rather simple classification schedule of seventeen pages followed by a four-page index with relatively minor changes from the 1964 edition. Unlike many LC classification literature schedules, it does not make any distinction for voluminous authors but instead provides one table of subdivisions for all individual authors that is followed by an example of its application for an imaginary author. The classification seems quite stable though the LAC copy that the author examined included additional, internal hand-written annotations to help LAC catalogers by giving the cutters for special topics where authorized by the printed version.

A third edition appeared in 2003, but only as an electronic publication in PDF or RTF format. To quote the preface: "The third edition has been prepared partly because the earlier edition has been out of print for several years, but primarily to cover new periods to reflect the passage of time."[34] The general classification tables extend from pages six to sixteen followed by rules for establishing individual authors (17), "Table of Subdivisions under Individual Authors" (18), and an index (19–22). This edition eliminated the example of classification for an imaginary author that gave a specific case of how the classification might be used. One last issue worth mentioning is that classifying separately English and French literature creates the problem of how to classify Canadian literature in languages other than French or English and which language gets the primary classification if the work treats both French and English literatures with relative equality.[35]

Classification of Canadian Law

The classification of Canadian law, Library of Congress Class KE, is technically outside the scope of this paper because KE is an official classification schedule used at the Library of Congress rather than an extension of LCC for Canadian subject content. A few words are in order, however, both because of the lengthy discussion in the 1972 *Report* and the fact that Sylvestre, National Librarian from 1968–83, claimed the development of the classification for Canadian law as one of the accomplishments of LAC during his tenure. He wrote that "bibliographic services based on Canadiana the national bibliography were improved by developing lists of Canadian subject headings and of LC classification tables for Canadian history . . . and Canadian law."[36]

The importance of the classification of Canadian law can be seen by the fact that the space devoted to this question in the 1972 *Report* is the same as the combined attention to Canadian history and literature. The survey described earlier that was undertaken for this *Report* showed that the sixty-five reporting libraries were using nine different methods to organize Canadian law including fifteen who chose to arrange legal materials in alphabetical order by main entry.[37]

The *Report*'s preferred recommendation was that the Library of Congress "either give responsibility to a Canadian team of legal experts to draft a schedule for KE (Canadian Law) or accept the assistance of such a Canadian team in order to expedite the publication of this class." Only in the eventuality of LC rejecting these alternatives did the *Report* recommend "the National Library should assume the responsibility for the development of this schedule."[38]

LC accepted the offer of help from the Canadian library community. In the Preface to Schedule KE, published in 1977 as quoted in *National Library News*, Blume and Howard acknowledged that

the appearance of Class KE is the result of a cooperative effort between the National Library of

Canada and the Library of Congress. Ann Rae of the National Library of Canada . . . developed the schedule around the LC collection of Canadian legal materials and the printed shelflist holdings of the York University law library. The section on the law of Quebec was developed by Guy Tanguay, law librarian at the Université de Sherbrooke. The developing schedule was reviewed periodically by a committee of Canadian law librarians and the appropriate staff members at the Library of Congress.[39]

Nonetheless, most Canadian law libraries use a modified KF classification, developed by the York University Law Library, which was published in 1982 and then revised in 1994 with subsequent additional updates to its loose-leaf format.[40] "The KF Modified system has been called Canada's national law classification scheme. It is used at approximately 167 libraries across the country, with its popularity growing particularly among corporate libraries."[41] The KF Modified system classifies legal materials from all countries by using a Z Cutter number. LAC provides classification numbers from the KF modified schedule for its CIP cataloging but does not retain them in the permanent record in the AMICUS database.[42]

The Dewey Decimal Classification

The Dewey Decimal Classification (DDC) poses fewer issues for Canadian libraries because, unlike the Library of Congress Classification, DDC is not based upon the literary warrant of a collection and is intended for use in a broad range of libraries around the world. DDC provides options for libraries to adapt its classification to local needs and to the scope of individual collections. The 1972 *Report* did not have any recommendations to make about DDC and noted that "the subgroup did not concern itself with the Dewey Decimal Classification which, in any event, provides an acceptable standard for those using it though local practices may very somewhat."[43]

Modifications to DDC at LAC include: (1) using the optional Canadian numbers for the struggles between France and England for Canada, for the War of 1812, and for Pontiac's Conspiracy rather than the preferred American history numbers; (2) upper-case "C" for Canadian literary works; and (3) using lower-case "j" for works directed to be read by juvenile readers; and (4) ignoring instructions to divide alphabetically because of the potential problems where a name differs between English and French.[44] The report on the results of a survey in 1987 on the use of DDC

in Canadian libraries stated that "as far as the National Library's options for Canadian history, juvenile literature, and Canadian literature are concerned, the first two are the most heavily used." "The overall impression created by the responses is that the libraries participating in this survey are generally satisfied with National Library policies."[45]

The Dewey Services unit at OCLC provides suggested DDC numbers for *CSH* headings. According to their Web site: "Each month, the Dewey editorial team maps new CSH (sic) to candidate numbers from the current DDC edition. The goal of the service is to associate terminology for Canadian topics of interest with the DDC." This service started in December 2003 and is based upon the monthly lists of new *CSH* headings produced at LAC.[46]

Canadian Subject Headings (CSH)
History

Canadian Subject Headings (*CSH*) is the most important tool for access to Canadian content not covered in specific enough detail by the Library of Congress tools. *CSH*, whose current version has slightly more than 6,000 headings, has a long history. The Technical Services Section of the Canadian Library Association took on the creation of this list in the 1960s. The first "preliminary edition," cited with a 1964 date, may not have been published because no library lists holdings for this edition in the AMICUS database of Canadian library holdings. A typescript "partial edition" of *A List of Canadian Subject Headings* appeared in 1966.[47] The *List* has 48 pages with about 12 entries per page (both headings and cross references). The introduction states that (1) "headings have been selected mainly from the Library of Congress list of subject headings"; (2) additional references have been added to *LCSH* headings "to provide for the Canadian point of view"; (3) "L.C. subject headings have been modified to adapt them more closely to Canadian terminology"; and (4) "new headings have been added where circumstances require them."[48] This edition also provides guidance on valid subdivisions with "Canada" and "Alberta" as the models and promises additional model subdivisions in subsequent editions.

A more official, hardbound version from the same committee and with the same authors appeared in 1968 as *A List of Canadian Subject Headings* with the cover title, *Canadian Subject Headings*.[49] Stated to be the "first edition," it expands coverage substantially to 90 pages with about 10 entries per page: "This list of subject headings contains headings in English for topics that relate to Canada and is intended for use by cataloguers handling Canadian materials. It is designed to supplement and to be used in conjunction with the Library of Congress list of subject headings."[50] It follows the same principles as the

1966 "partial edition," adding Toronto as the example city subdivision and providing specific period subdivisions for each province under the topical subdivisions "Description and travel," "Economic conditions," "History," and "Politics and government."

The 1972 *Report* stated, "libraries agreed that *A List of Canadian Subject Headings* was very useful and expressed a desire for a revised and enlarged edition."[51] The library survey used in preparing the *Report* indicated that "about half the libraries surveyed used *A List of Canadian Subject Headings* and that they were especially interested in further expansion in the areas of "education, cultural groups (including native peoples), historical events, historical and literary periods, municipal matters, northern development, politics, provincial matters, and social issues."[52] The *Report* recommended that LAC continue to accept *LCSH* "as the basic standard English subject heading list," that "a separate Canadian list be established as a standard for Canadian topics not adequately covered in the Library of Congress subject headings list," and that "development of this list should take into account the existing publication, *A List of Canadian Subject Headings*." It also recommended that such a list clearly distinguish between LC and Canadian headings.[53] After a discussion of French language subject headings, the *Report* recommended that LAC be responsible for the development, publication, maintenance, and updating of the list including regular publication of additions and changes.

The first LAC edition of *Canadian Subject Headings* appeared in 1978.[54] It includes an extensive introduction, the list of headings and cross references, an English-French index, and a French-English index. This edition has 3,300 headings along with the associated references and scope notes.[55] The preface by Durance, Director, Cataloguing Branch, states, "*Canadian Subject Headings* was developed in response to a need in Canada for standardization in the subject analysis of topics related to Canada." She continues on to say that "it supersedes *A List of Canadian Subject Headings* published in 1968 by the Canadian Library Association and is intended to serve as the English language standard for the subject control of Canadian topics."[56]

The introduction to the 1978 edition defines its scope to include "not only headings which deal with Canadian topics in detail (such as Canadian history and literature) but also a selection of headings from various fields where there is a considerable body of Canadian material or where Canada has a major interest, *e.g.*, Mines and mineral resources."[57] Period subdivisions for Canadian history correspond to those in the FC classification and period subdivisions for Canadian literature to those in the PS8000 schedule. This edition of *CSH* implements one of the 1972 *Report*'s recommendations by using a system of notations to indicate the relationship between the *CSH* heading and *LCSH*:

= means heading identical to LC;

≠ means different from LC;

// means heading is analogous to what LC has used in the American context;

+ means heading itself is identical to LC but the *sa* references, *x* references, *xx* references, *xx* references and *and/or* notes are different.[58]

LAC promised in the 1978 edition that "regular supplements incorporating revisions and additions to *Canadian Subject Headings* will be issued periodically to update the present list."[59]

Schweitzer, LAC subject cataloging expert and the person with primary responsibility for *CHS*, wished that there had been more time to prepare the first LAC edition of *CSH*. She was concerned that the number of headings was "not as extensive as it might have been under more favorable circumstances" and also worried about its theoretical underpinnings.[60] She set as a goal for the next edition the "enhancement of those qualities of rationality, consistency, thoroughness, and usefulness which suffered most from the exigencies attending on the preparation from the 1978 list."[61] While much work had been done, she recognized that the key task of developing a consistent theoretical basis for *CSH* remained:

> We need to think out and formulate broad principles of approach, general patterns and procedures to follow in order to produce a list of subject headings that is accurate, comprehensive and truly useful to the varied public which will be using it. The ideal to strive for is the maximum of specifically Canadian coverage with a minimum of divergence from LCSH since in the great majority of cases the two lists would be used in tandem in Canadian libraries.[62]

In addition, she recognized the general problem that a specialized list faces in creating a syndetic structure with a limited number of headings. She understood the seriousness of this issue because she believed that a "collection of subject headings which merely lists the concepts without demonstrating their relationships, both horizontal and vertical, can be of only limited use as a tool of subject analysis."[63]

A 1983 announcement of the next edition of *CSH*, two years before its appearance, repeated the needs to enhance the list "to incorporate new policies of the Library of Congress"; to add concepts created since the 1976 cutoff date "or which have somehow escaped scrutiny in preparation of the first edition"; and to enhance the "uniformity of

approach, treatment, thoroughness and consistency, as a result of experience with the list by the National Library and other users over the last two years."[64]

Canadian Subject Headings, Second Edition/Deuxième Édition, was published by LAC in June 1985.[65] It included introductory matter; headings and cross references; English-French Index: Headings; English-French Index: Subdivisions; Index français-anglais: vedettes; and Index français-anglais: subdivisions. It also included approximately 1,440 headings and 765 subdivisions. While the author was unable to find official statistics on the number of subject headings, counting the number of headings in the two indexes gives a total of approximately 1,440 headings and 765 subdivisions that then can be combined to create additional complex subject headings.

The 1985 "Rationale for a New Edition of CSH" indicated the extensive philosophical changes in this edition:

> This completely reworked and enlarged edition is more than a relisting of the contents of CSH1 with changes and additions. It reflects considerable experience gained by the National Library of Canada (NLC) in the course of applying CSH in the intervening period and it incorporates numerous comments and suggestions contributed by the many and varied libraries which rely on CSH for the cataloging of Canadian materials. CSH2 represents as well a new approach to subject analysis, which attempts to minimize the difficulties of the user who must deal with a subject retrieval system which has in recent years become vast and very complex and which is changing at a furious pace.[66]

Major changes in the 1985 edition included fewer headings that differed from *LCSH*, much expanded scope notes and instructions, an increased number of references, a revision of chronological subdivisions, and the separation of the indexes into headings and subdivisions. The earlier symbols used to indicate the relationship of the heading to *LCSH* were replaced by a new notation, "CSH", for headings unique to *CSH*.[67]

After the major reworking of the second (1985) edition, the third edition of *Canadian Subject Headings*, published in 1992, provided only incremental changes.[68] The total number of pages increased to 603 (26.4 percent) from the 477 in the second edition. The format remained the same. Schweitzer stated that the third edition had 6,000 headings.[69] This is probably an overestimate since the April 2006 count of *CSH* headings online is 6,082.[70] The annual increase in the number of CSH headings has been approximately 75 to 100 topical subject headings or 175 to 200 total headings if one includes geographic names used as subjects.[71]

The 1992 introduction stated, while the second edition of *CSH* represented a major change, "this new edition builds on its predecessor and continues its policies as they were formulated in the introduction to CSH2."[72] Much of the introductory matter on scope, aims, and relationship to *LCSH* is nearly identical to CSH2. Perhaps part of the reason for this continuity, the introduction continues, is that "the favourable response from our body of users who overwhelmingly found CSH2 contents useful and its format convenient is both gratifying and reassuring. We plan to continue along the above stated lines."[73] From the Canadian perspective, the most notable expansions in the third edition were "for topics dealing with the Canadian native groups" and "directional" geographic headings for regions of the larger Canadian provinces. Another major change was the abolition of the "city flip" in keeping with changes in *LCSH*: "Until 1985, the *Subject Cataloging Manual* and *Library of Congress Subject Headings* provided two separate list of subdivisions under places, one for cities (H1135) and one for regions, countries, etc. (H1145). When the city flip was discontinued (cf. H832), it was possible to resolve the few remaining discrepancies between the two lists and to consolidate them into a single list of subdivisions used, as applicable, under regions, countries, cities, etc."[74] At this time, LAC did not follow *LCSH*'s decision to change from the subject heading list terminology (see, see also, see also from, etc.) to a thesaurus structure (use for, narrower term, broader term, etc.). This change occurred later when *CSH* became part of AMICUS in 1997.

CSH3 was the last complete printed edition. Semiannual supplements continued to be printed through Supplement 12 in 1999.[75] Since 1997, authority records have been available in the AMICUS database where they can be viewed either in thesaurus-like display or in MARC format.[76] Since October 2000, users have been able to search both *"CSH on the Web"* and *"RVM on the Web"* by browsing, by specifying exact terms, or by keyword searching. Headings are updated monthly; an archived version of each individual update is available in both PDF and RTF for those who wish to track changes.[77] The AMICUS version of *CSH* is more complete than earlier printed editions because it includes specific events—such as individual strikes, buildings, and lakes—that were intentionally left out of printed versions.[78] Finally, a 19-page list of authorized subdivisions can be consulted in the PDF format.[79]

Current Maintenance of *CSH*

The creation of new headings is based upon literary warrant, which means that a new heading will be created only when an item to be cataloged justifies the new term. The cataloger, after having done some preliminary research, submits the proposal to the *CSH* editor, who is responsible for both topical and geographic subject headings. The editor then checks

reference sources, double-checks both *LCSH* and *CSH* for a possible existing heading, and then formulates a heading in keeping with LAC and LC policies as applicable. According to LAC policy, each subject heading should have at least one reference, which can be a reference to a broader term. If the heading is a candidate to be sent to LC for possible inclusion in *LCSH*, the editor first consults with the Subject Headings Editorial Committee at LAC. Otherwise, the editor adds the heading directly to the AMICUS database. In addition, the editor sends the heading, along with a list of sources consulted, to the *RVM* section at the Université Laval for an equivalent French heading to appear in *Canadiana* (the national bibliography) and other LAC cataloging products for distribution.

Triggers for revised headings, including cancellations, can be updates to LC or LAC policy (such as the recent change from Quebec to Québec), comments from catalogers, or the editor's knowledge of changes in terminology. LAC also invites questions and suggestions for new or revised headings and receives about twenty-five annually.[80]

Relationship with *LCSH*—Differences

Schweitzer, who retired in 1995, was mainly responsible for putting *CSH* on a firm theoretical footing. Her writings often mention the tension between, on the one hand, following *LCSH* for its comprehensiveness, its usefulness in sharing catalog records, and its status as one of the library world's most important information seeking tools and, on the other, providing suitable access to Canadian content. She emphasized this conflict in "Subject Access to Library Materials in Canada: A Balancing Act between Conformity and Divergence."[81]

Elsewhere, she wrote less diplomatically about *LCSH*: "Nevertheless situations occur where a general system of subject retrieval terms, particularly one still not free from purely American attitudes, biases and distortions of scale, cannot adequately retrieve topics of Canadian interest."[82] Yet she recognized that *LCSH* is the way it is because it does what it is supposed to do—it mirrors the interests of the Library of Congress as the de facto national library for the United States and provides access, based on literary warrant, to a collection that "puts main emphasis on topics reflecting the nature of American society."[83] She also recognized that *LCSH* does not have the goal of serving as an international tool in the same way that the DDC does. She quoted Barbara L. Berman: "LC should not be expected to alter its own cataloging policies simply to suit the needs of other libraries; it is the other libraries that must determine how best to adapt LC cataloging for their own purposes."[84] Schweitzer acknowledged the importance of LC's products within the world of bibliographic control in an interview with Winston: "If our system differed too much from LCSH, Canada would

be left out of the world information network."[85]

On a more practical level, English-speaking Canadian libraries depend so heavily on Library of Congress cataloging products that the less *CSH* diverges from *LCSH*, the easier it will be for these libraries to adopt *CSH* when there are important rather than trivial reasons for doing so.

The principle in *CSH* therefore became as stated in the introduction to *CSH2* 2nd edition that "new divergent headings have been created only when the purely American context of the LCSH heading has proven inappropriate to our needs due to the differences in sociopolitico structure between Canada and the United States, as in the area of the legal system or official bilingualism."[86] Additionally, "minor variations such as differences in spelling, word order or actual terminology are not usually sufficient grounds for creating divergent headings since these matters are quite adequately handled with references; nor are divergent headings established without a thorough investigation and weighing of options."[87] Schweitzer summarized this as "the ideal to strive for is the maximum of specifically Canadian coverage with a minimum of divergence from LCSH since in the great majority of cases the two lists would be used in tandem in Canadian libraries."[88]

The following are the main areas in which *CSH* explicitly diverges from *LCSH*:

1. *Minor changes because of political and cultural differences.* In many areas, *CSH* retains the *LCSH* structure while making minor changes such as substituting "Province" and "Provincial" for "State"; using "Crown" or "Royal" where appropriate, and adding "Canada— History—War of 1812" for events that occurred in Canada.[89]

2. *Ethnic versus linguistic.* *LCSH* does not make the distinction between the ambiguity in English of using adjectives such as "English," "French," or "German" to describe either a language or a group of people. "In a Canadian context of linguistic duality and cultural pluralism, it was desirable to formulate subject headings in a manner which permits the differentiation of the two meanings." Thus in *CSH* the adjective in parentheses consistently refers to language while the nonparenthetical form denotes the ethnic/cultural group. Therefore "Almanacs, Canadian (Italian)" is the subject heading used for almanacs published in Canada and written in Italian.[90]

3. *Ethnic groups in Canada.* While *LCSH* uses the term "Italian Americans", similar constructions are not used for other countries so that "Italians—Canada" covers the two concepts that *CSH* divides by using "Italian Canadians" for Canadians of Italian origin and "Italians—Canada" for non-Canadian Italians in Canada.[91]

4. *Two official languages.* In *LCSH*, all languages other than English are "foreign languages"; and their speakers are "foreign speakers." This policy is impossible in the Canadian context with two official languages because a native speaker of either English or French who is learning the second language is not learning a "foreign language." Thus, *LCSH* "French language—Textbooks for foreign speakers" becomes "French language—Textbooks for second language learners" in *CSH*.[92]

5. *Terms for aboriginal peoples.* Many Canadians, including subject experts, use different terminology for aboriginal peoples than their American counterparts. Therefore Canadian discourse including published research justifies different headings in keeping with the principle of literary warrant. For *CSH*, the *LCSH* "Eskimos" were "Inuit" long before *LCSH* accepted the latter term. Canada also has three groups of native ancestry recognized by the census: Indians, Inuit, and Métis. For works about all three groups collectively, *CSH* has created the subject heading "Native peoples—Canada." Terminology varies for the names of some tribes so that the *CSH* "Huron Indians" corresponds to *LCSH* "Wyandot Indians." The chronological subdivisions for various headings such as "Indians of North America—Canada—Government relations" and "Indians of North America—Canada—Wars" "were worked out specially for *CSH*, since the LCSH periods may only be used for the American context and, being based on significant dates in American native history, are not appropriate for Canadian materials."[93] Future changes are also likely in this area since many Canadian experts and Canadian libraries are unhappy with the term "Indians of North America" and would like to agree upon a more culturally sensitive alternative.[94]

6. *Limited number of additional authorized subdivisions.* "A small number of subdivisions are unique to, or have been modified for CSH." As of April 2006, there are fourteen, most of which are connected with the *CSH* divergences listed above. Examples include "Asian-Canadian authors," "Films for second language learners," and "Speeches in Canadian Parliament."[95]

Some of the differences between *LCSH* and *CSH* are not so much divergences but rather extensions of *LCSH* practice within the Canadian context:

1. *More and different references when topics are subdivided by Canadian geographical entities.* Although in most cases, *LCSH* would authorize the use of the geographic subdivision, *CSH* includes many more references to help the user within the Canadian context.[96]

2. *More detailed chronological subdivisions.* Since "LCSH offers no period subdivisions for Canadian provinces and many fewer than CSH2 for Canada as a whole," *CSH* provides many more chronological subdivisions for all appropriate areas of Canadian content.[97]

On a more philosophical level, Schweitzer made very clear that she considered the increased user friendliness of *CSH* to be a divergence from *LCSH*. "Lastly, *CSH* is at all times aware of the need to be 'user-friendly'. . . . *CSH* has put great emphasis upon user guidance."[98] Special features of *CSH* include the introductory part with "a user's manual whose main arguments, though always illustrated in Canadian context, do not apply solely to Canadian topics but to subject retrieval by subject headings in general." *CSH* provides many more scope notes and references than *LCSH*. Schweitzer noted that *LCSH* has one scope note for every three pages while *CSH* averages three scope notes per page.[99] Overall, she was pleased that "these particular features of *CSH* have evoked much favorable response from its body of users, amply demonstrating that the effort was worthwhile."[100]

Taken as a whole, *CSH* achieves its goal of providing more explicit access to Canadian subject content while remaining within the *LCSH* structure. *CSH* has implemented major *LCSH* changes such as the city flip, thesaurus notation, and new policies for geographic subdivision, and will undoubtedly continue to do so in the future. The author believes that any user familiar with an *LCSH*-based bibliographic tool would have no difficulty in successfully adapting to a mixed environment of *LCSH* and *CSH* headings and might not even notice the difference.

Relationship of *CSH* with *LCSH*—Cooperation

Notwithstanding any philosophical divergences with LC, *CSH* has benefited from excellent practical relations between LAC and LC. Their mutual status as national libraries and distributors of cataloging products has facilitated cooperation and relationship building among the key experts in bibliographic control at both institutions. Various meetings of national libraries at IFLA; groups such as the Association of Bibliographic Agencies of Britain, Australia, Canada, and the United States (ABACUS); and cataloging policy-making bodies such as the Joint Steering Committee for the Revision of the Anglo-American Cataloguing Rules provide excellent opportunities for communication and relationship building between the two institutions, even when *CSH* is not high on the list of discussion topics. One difficulty for *RVM* is that its sponsor, the Université Laval, is not a national library.[101]

Efforts at cooperation go back to 1976, two years before the first edition of *CSH*. A 1975 cooperative agreement between LC and LAC on name headings included the provision that "all new topical subject headings created by

the National Library of Canada which are not specifically related to Canadian cultural and historical context will be submitted to the Library of Congress for possible incorporation into *Library of Congress Subject Headings . . .* though the National Library of Canada will develop those subject headings which are uniquely Canadian and publish them separately.”[102]

During the 1980s, steps toward closer cooperation occurred within the context of ABACUS. At the Fifth Meeting on International Cataloguing Cooperation, it was reported that “NLC had already had some discussion with LC concerning the submission of some 4000 headings covering topics peculiar to Canada contained in *Canadian Subject Headings*” and that “LC agreed to take up the matter” especially since at LC “there was a discernable movement away from the principle of not holding subject headings for which there were no corresponding bibliographic records.”[103] At a followup meeting, “LC opened the discussion by stating that it is establishing procedures for incorporating contributions of Canadian and Australian subject headings into its *LC Subject Headings*.”[104]

Tangible results from any cooperation, nonetheless, had to wait until 1994 when LAC became an early participant in the Subject Authority Cooperative Program (SACO).[105] The first three headings from LAC accepted for *LCSH* were “Hockey for women,” “Physically handicapped young adults,” and “Loneliness in old age.” All three were based upon literary warrant from publications cataloged at LAC.[106]

Between 1994 and 2006, LAC submitted approximately 550 proposed headings or about forty-five annually. The great majority of them have been adopted. Most of the six rejections during this period were for technical reasons, though one or two were not acceptable because of their subject terminology.[107] The advantage to LAC from this cooperative effort is that it reduces the number of entries from *CSH* in the AMICUS database and simplifies integrating subject headings into the OPAC for those libraries that have exception routines for adding *CSH* headings.

Users of *LCSH* also benefit from this relationship. *CSH* is listed in the *LC Subject Cataloging Manual* as a source for new headings.[108] *CSH* also is given as a link on the Cataloger's Desktop and on SACO's home page.[109] LC has adopted headings for *LCSH* such as Inuit and Métis that originally appeared in *CSH*, may consult with LAC about possible new subject headings additions and changes with Canadian content, and cites *CSH* as a source of new headings.[110]

Sears List of Subject Headings: Canadian Companion

The final product that modifies an American tool for purposes of Canadian subject access is the only treated in

this paper without any official connection with LAC. *The Sears List of Subject Headings: Canadian Companion,* currently in its sixth edition, first appeared in 1978.[111] The “Introduction” to the sixth edition states:

> The original compilers developed the Canadian Companion to the *Sears List of Subject Headings* to fill a continuing need for a list of supplementary subject headings pertaining to Canadian topics for use in small and medium-sized libraries. It covers in some depth distinctively Canadian topics, notably those relating to Canadian history, politics, and constitutional matter; the official languages; and the multicultural nature of Canadian society. It also includes other relevant though not uniquely Canadian topics.[112]

The current edition has twenty-six preliminary pages that include the introduction, symbols used, and a list of canceled and replacement headings followed by seventy-five pages of subject headings and references with about forty entries per page. The *Companion* is not comprehensive and is intended to be used with the full *Sears List of Subject Headings*. Schweitzer reported that “*CSH* has had influence on *Sears Canadian Companion* which generally pursues similar aims and objects and has also adopted, sometimes with simplifications, much of the specifically Canadian vocabulary of *CSH*.”[113] While the same remains true in general for the current edition, no simple one-to-one correspondence exists between subject headings in *CSH* and *Sears*.[114] For example, one of the major changes in the current *Sears* edition is the use of “First Nations for Indians of North America,” a major revision that has not yet occurred in either *LCSH* or *CSH*.[115]

Use of the Canadian Subject Tools
Library and Archives Canada

LAC uses both the LCC extensions and *CSH* for its own cataloging. Its current records appear in the AMICUS database; on the three-disc CD-ROM version of *Canadiana,* the national bibliography, now that a printed version is no longer published; and on its cataloging data tapes for distribution. These subject access tools are not present in all records, however, because LAC has three levels of cataloging. Only full cataloging (41 percent in 1998) includes both LC classification and subject headings while minimal level cataloging (39 percent) provides LC classification for most items. The abbreviated level (20 percent) includes no subject headings and classification only if needed for shelving. Nonetheless, 55 percent of Canadian monographs receive full treatment, including virtually all trade

monographs through the Cataloging in Publication (CIP) program.[116]

Other LAC products that have used the subject extensions are:

1. The Canadian Institute for Historical Reproductions Catalogue—the catalog followed the same standards as *Canadiana*.[117]
2. Canadian Information by Subject—this guide to Internet resources about Canada uses *CSH* for appropriate subject headings but chose DDC for classification.[118]

The production of CIP records is a distributed process in Canada. The participants may consult with the *CSH* editor at LAC about establishing new headings in CIP records or may tentatively establish new headings on their own. The *CSH* editor then reviews all subject assignments for the final record and may make changes. The CIP records may also use the LCC Canadian extensions in addition to *CSH* headings.[119]

Other Canadian Users

Evidence on the use of the Canadian subject extensions by other Canadian libraries is difficult to find. LAC has taken measures to simplify the use of *CSH* and the LCC extensions by coding them in the MARC records and by usually including a "see/use" reference in its authority records where a *CSH* heading replaces a *LCSH* heading. In this way, other libraries can identify Canadian subject extension during automatic data loading from various sources. An article by Beheshti, Large, and Riva discusses the cost savings from using MARC records produced by LAC, but does not include any specific references to the Canadian extensions to *LCC* and *LCSH*.[120] The extent to which Canadian libraries make such changes is an important topic for future research.

A preliminary report on *Status of Conversion of F to FC (Canadian History) in CARL 1988* showed that the fifteen of the eighteen Canadian academic research libraries that were members of the Canadian Association of Research Libraries (CARL) at that time had either reclassified Canadian items in F to FC or had plans to do. The remaining three that did not intend to reclassify materials nonetheless used FC for current cataloging. Eight had completed this reclassification.[121]

In 1998, LAC surveyed Canadian libraries on the use of *CSH* and had a 43 percent response rate. Of the respondents, 42 percent were public, municipal, or regional libraries; 25 percent were university or college libraries; 16 percent were federal government libraries; and the rest were special or school libraries, bookstores, and other. The results included the following findings: (1) respondents' top three reasons for using *CSH* were to identify authoritative

subject headings for assigning to bibliographic records (33 percent), to create a subject authority file (20 percent), and to find English/French terminology on Canadian topics (19 percent)—they also used *CSH* for reference work, for cataloging instruction, and as an indexing tool; and (2) 57 percent of respondents used both the English/French and French/English indexes.[122]

The minutes of the 2005 annual meeting of the Technical Services Interest Group and the Serials Interest Group at the Canadian Library Association Annual Conference included a discussion about the use of *CSH* by Canadian universities. The minutes state:

> Representatives in attendance from various libraries cited different practices. Some retain CSH headings if they are in the record, but do not add them if they are not. Some retain them when there is no LC equivalent. Some add CSH headings in some cases, based on a list of headings and subject areas that are not well covered by LC.
>
> Different authorities vendors also have different practices: some prefer a CSH heading over an LC equivalent; some include a CSH heading only when there is no LC equivalent. Some of the vendors are also not adding CSH updates to the databases.[123]

The author discovered that detecting *CSH* usage in the Canadian union list version of AMICUS was inconclusive because many *CSH* headings are miscoded as *LCSH* headings. A systematic study of these records might yield useful data on how Canadian libraries use *CSH* headings.

Use by Canadian Studies Scholars

The LCC extensions and especially *CSH* can help scholars outside Canada even if they intend to retrieve their documents from a non-Canadian source. Some evidence exists that this occurs. The *CSH* editor believes that *CSH* has users in other countries on all continents, such as national libraries and universities offering Canadian studies or containing large collections of Canadiana.[124]

Since AMICUS is freely available on the Web, Canadian studies scholars can search the database with *CSH* terms either for LAC materials or for items in the Canadian union catalog. Scholars can also browse headings in classification order for FCC and PS8000 at libraries where this function is available though this is not an option in the AMICUS database. Such searches are more effective in identifying Canadian materials than those that use less Canada specific tools, such as LCC and *LCSH*. Canadian studies scholars who find citations for relevant materials through these

searches may be able to consult them in their local library or through interlibrary loan.

Similar Work in Other English-Speaking Countries

Evidence of similar efforts in at least one other English-speaking country exists. Following up on a report from an ABACUS meeting, the author learned that the Library Association of Australia published *A List of Australian Subject Headings* in 1981.[125] Similar to the Canadian experience, the National Library of Australia has taken over the process through its Australian National Bibliographic Database Section. The Australian Subject Access Project aims "to maximize the impact of online access to Australian subject terms. It is based on the second edition of List of Australian Subject Headings, an unpublished ALIA work, commonly called SLASH, which will gradually be implemented on the Australian National Bibliographic Database."[126] The information on the National Library of Australia Web site presents a very comparable picture to that of LAC regarding the reasons for the extensions, their format, and their use.

Chan reports that "libraries that have adopted, translated or adapted controlled vocabularies based on *LCSH* include those in Belgium, Brazil, Canada, the Czech Republic, France, Great Britain, Lithuania, Malaysia and Portugal."[127] The author has not found evidence of national level extensions in English for any of these countries. The *CSH* editor has received inquiries from institutions in countries such as the United States, Australia, New Zealand, South Africa, and Algeria about various aspects of *CSH* and its local implementation.[128]

Conclusions

1. *Library and Archives Canada as a national library is the appropriate agency for the maintenance of FC, PS8000, and CSH.* As a national library, LAC brings great strengths to maintenance of the Canadian extensions to LCC (FC and PS8000) and *CSH.* First, as the beneficiary of legal deposit, LAC has the most extensive access to materials published in Canada even if not all these items receive full cataloging. Second, LAC has influence throughout Canada as the leading producer of cataloging records for Canadian materials. Third, LAC has provided stable funding for these resources that would have been difficult to maintain through either voluntary efforts by professional associations or through a consortium of libraries.

2. *LAC has been correct in choosing to diverge from LC products only when absolutely necessary for specific subject access to Canadian content.* In an era of reduced resources, making changes with the most impact is the best strategy since it reduces the costs to other libraries in adopting the specifically Canadian headings.

3. *Creating country-specific subject headings in the same language as* LCSH *may be more difficult than recreating* LCSH *in a new language.* Paradoxically, the author believes that it may be more difficult to create extensions to subject headings in English than it is to start from scratch in another language. Establishing a translated version of *LCSH,* especially if based upon literary warrant, can independently build upon the linguistic principles and established terminology of the new language. Establishing extensions to *LCSH* involves more complex decision making on when to create a subject heading because of the tension described earlier in the article between conformity and divergence. Building upon *LCSH* also requires modifying these subject headings to reflect changes in *LCSH* policy to make them compatible for retrieval systems that use both *LCSH* and the *CSH* extensions.

4. *More research is needed on the use of FC, PS8000, and CSH by Canadian institutions.* An analysis of the use of the Canadian extensions by Canadian libraries would be an excellent topic for future research.

5. *Canadian studies scholars could benefit from using FC, PS8000, and* CSH *even if they plan to obtain their resources from non-Canadian sources.* Canadian studies scholars are able to obtain more specific access to Canadian topics by using access tools such as the AMICUS database. These tools provide greater subject specificity even if scholars plan to obtain the materials from other sources.

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